

Web Access–Financial Aid

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5.1 Financial Aid Overview

The Financial Aid pages allow you to link to information about Title IV loans and grants. They provide detailed information about the borrower's loans and grants. The Financial Aid diagram is shown in Figure 5–1.

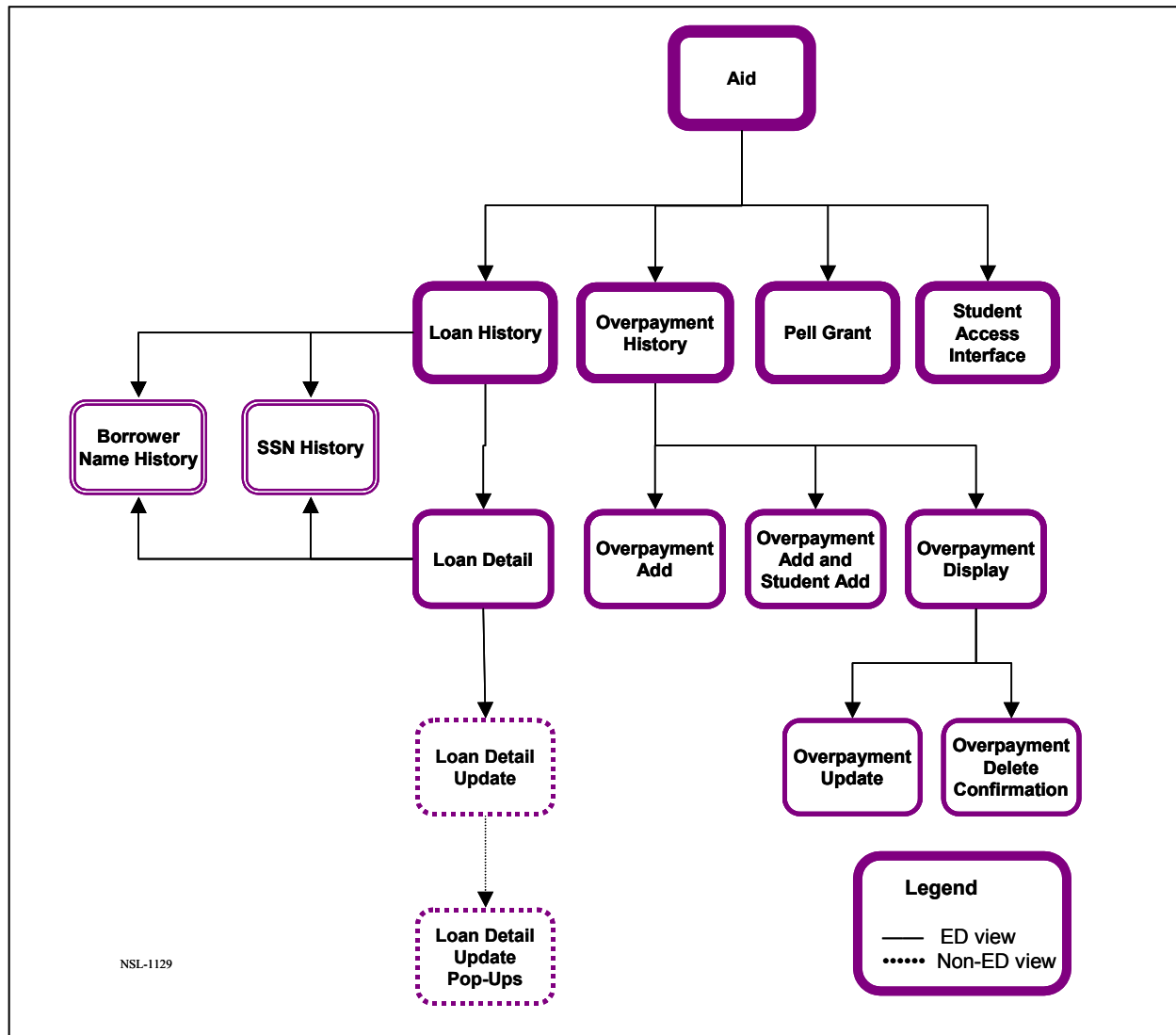


Figure 5–1, Financial Aid Diagram

5.2 Loan History

The Loan History page displays the following:

- Icons warning or informing users that the student or PLUS borrower meets one or more conditions that may affect his or her eligibility for further aid.
- Aggregate information about all loans for which the student or PLUS borrower is personally responsible.
- Information about Master Promissory Notes on Direct Stafford or Direct PLUS loans taken out by the student or PLUS borrower, or on Direct PLUS loans taken out by a parent or guardian on behalf of the student.
- Summary information about all loans received by the student or PLUS borrower, as well as PLUS loans taken out on behalf of the student.

How to access a student's Loan History

To access a borrower's loan history:

- 1 Type **SSN**, **First Name**, and **DOB**.
- 2 Click **Retrieve**.

How to interpret Warning Symbols and Information Icons

The warning and informational icons at the top of the Loan History page reflect the status of loans and other aid for which the borrower is personally responsible. Users wishing to check the status of PLUS borrowers who have taken out loans on behalf of students should view the Loan History page for the PLUS borrowers and not rely on the student's page to verify the eligibility of the PLUS borrowers for further aid.

- **Bankruptcy**—The borrower has one or more loans in active bankruptcy status.
- **Defaulted**—The borrower has one or more loans in default status.
- **Overpayment**—The borrower has one or more active overpayments that have not been deferred, waived, or had satisfactory arrangements made for them.
- **Discharge**—The borrower has one or more loans with a discharge code. Discharges are identified according to the following order of precedence:
 - *Death*

- *Reaffirm*
- *Conditional*
- *Permanent*
- *Multiple*
- **Additional Unsub**—The borrower has a Direct Stafford Unsubsidized (D2) or FFEL Stafford Unsubsidized (SU) loan with Additional Health Profession or PLUS Denial indicators.
- **Close to Sub. Limit**—The borrower is close to the aggregate limit for subsidized loans.
- **Exceeds Sub. Limit**—The borrower is nearing or exceeds the aggregate limit for subsidized loans.
- **Close to Comb. Limit**—The borrower is close to the aggregate limit for subsidized, unsubsidized, and/or FFEL Consolidation, Unallocated loans combined.
- **Exceeds Comb. Limit**—The borrower exceeds the aggregate limit for subsidized, unsubsidized, and/or FFEL Consolidation, Unallocated loans combined.
- **Pell Grant**—The borrower has received one or more Pell Grants for the current award year or the prior award year.

The screenshot displays the NSLDS (National Student Loan Data System) interface. At the top, there is a navigation bar with links: Menu, Aid, Enroll, Org, Report, and Support. Below this is a header section with links: Loan History, Overpayment History, Pell Grant, and Student Access Interface. The user is logged in as SAMUEL P BRUTCHER from the Department of Education Region 0. The student's profile is shown for STEVEN J OTTEN, with SSN: 556-44-1003 and DOB: 03/08/1979. Below the profile, there are six warning icons: Bankruptcy, Defaulted, Overpayments, Discharged, Additional Death, and Sub Limit. To the right of these icons is an information icon labeled Pell Grants. Below the warning icons is a section titled 'Aggregate Loan Information' which contains a table with the following data:

Loan Type	Outstanding Principal Balance	Pending Disbursements	Total
Subsidized Loans	N/A	N/A	N/A
Unsubsidized Loans	N/A	N/A	N/A
FFEL Consolidation Loans, Unallocated	N/A		N/A
Combined Loans	N/A	N/A	N/A
FFEL Consolidation Loans	N/A		N/A
Perkins Loans	\$609		\$609

Figure 5–2, Warning Symbols and Information Icons

How to add information to Transfer Monitoring List

Directly below the warning icons, if any appear, school users will see a message that states whether the borrower is on their school's Transfer Monitoring list and a button that will allow them either to add the borrower to their Student Monitoring list or to view the borrower's status if he or she is already on their Transfer Monitoring list.

To add a student to Transfer Monitoring List:

- Click **Add Student to Monitoring List**.

To view this student's information on the Transfer Monitoring List:

- Click **Student Monitoring Detail**.

How to interpret the Aggregate Loan Information

The Aggregate Loan Information table displays the Loan Type, Outstanding Principal Balance, Pending Disbursements, and Total for various aggregates. Only loans for which the borrower is

directly responsible affect the aggregate totals. PLUS loans taken out by a parent on behalf of a student do not figure into the student's aggregate totals.

- **Loan Type**—Aggregate amounts are displayed for the following loan types:
 - **Subsidized Loans**—Direct Stafford Subsidized (D1), FFEL Stafford Subsidized (SF), Direct Consolidation Stafford Subsidized (D6), and that portion of FFEL Consolidation (CL) loans that can be attributed to underlying subsidized loans.
 - **Unsubsidized Loans**—Direct Stafford Unsubsidized (D2), Direct Consolidation Unsubsidized (D5), FFEL Refinanced Loan (RF), Non-subsidized FFEL Stafford Loan (SF), FFEL Supplemental Loan (SL), FFEL Stafford Unsubsidized (SU), FISL Federally Insured Loan (FI), and that portion of FFEL Consolidation (CL) loans that can be attributed to underlying unsubsidized loans.
 - **FFEL Consolidation Loans, Unallocated**—That portion of FFEL Consolidation (CL) loans that cannot be attributed to underlying subsidized or unsubsidized loans. Since this amount counts against a student's combined borrowing limit, it may represent additional eligibility if a school can demonstrate that it should not count against that limit.
 - **Combined Loans**—Direct Stafford Subsidized (D1), Direct Stafford Unsubsidized (D2), Direct Consolidation Unsubsidized (D5), Direct Consolidation Subsidized (D6), FFEL Refinanced Loan (RF), Subsidized and Non-subsidized FFEL Stafford Loan (SF), FFEL Subsidized Loan Supplemental (SL), FFEL Unsubsidized Stafford Loan (SU), FISL Federally Insured Loan (FI), FFEL Consolidation (CL).
 - **FFEL Consolidated**—FFEL Consolidation Loan (CL).
 - **Perkins**—Federal Perkins Loans - National Defense Loan (DU), Perkins Expanded Lending (EU), Income Contingent Loan (IC), National Direct Student Loan (NU), Federal Perkins Loan (PU).
 - **PLUS Loans**—FFEL PLUS Loan (PL), Direct PLUS (D4), Direct PLUS Consolidated (D7). A PLUS Loan row appears in the Aggregate Loan Information table *only* when the student/borrower displayed on the page holds a PLUS Loan.
- **Outstanding Principal Balance**—Sums the Aggregate Outstanding Principal Balance for all loans held by the borrower.
- **Pending Disbursements**—Sums the net loan amount that is awaiting disbursement to the borrower for this aggregate.
- **Total**—Sums Aggregate Outstanding Principal Balance and Pending Disbursements.

Note The sorting and filtering on the Loan Summary table below does not affect these aggregates.

How to interpret Master Promissory Notes

The Master Promissory Note (MPN) table displays codes to indicate whether the student or PLUS borrower whose information is displayed on the Loan History page has any MPNs on Direct Stafford or Direct PLUS loans. In addition, it displays an MPN code for any PLUS borrowers who have taken out Direct PLUS loans on behalf of the student displayed on the page.

Codes are displayed in the following order of priority:

- **A**—Active Status
- **C**—Closed Status
- **I**—Inactive Status
- **N**—No MPN

Note For the student or PLUS borrower displayed on the Loan History page, a code of “N” can mean either that the student or PLUS borrower has not taken out any Direct Stafford or Direct PLUS loans at all, or that the student or PLUS borrower has taken out such loans but that they do not have MPNs associated with them.

For PLUS borrowers who have taken out loans on behalf of the student displayed on the Loan History page, a code of “N” can only mean that the PLUS borrower has taken out one or more Direct PLUS loans on behalf of the student but there is not any MPN associated with those loans.

How to sort and filter the Loan Summary

The default setting for the Loan Summary displays data for every loan taken out by the student, or taken out by a PLUS borrower on behalf of a student, sorted by Loan Date.

You may choose which loans to display and the sort order by using the Sort by and Display Only options.

To use Sort by:

- 1 In the **Sort by** box, select a sort option.
- 2 Click **Submit**.
- 3 The page is updated with the new sequence numbers.

To use Display Only:

- 1 In the **Display Only** list, select an option.
- 2 Click **Submit**.

The sorting and filtering options that are currently in use display below the box containing the sort and filter options. Please remember that the filtering options you select will affect which of the borrower's loans display on the page. If you don't see a loan you are looking for, check the filter option to make sure that it hasn't excluded from display the loan you seek.

Only 20 loans display per page. If the student has more than 20 loans, the Next Group arrow icon appears. Click this to view the next page of loans. Click the Previous Group arrow icon to view the previous page of loans.

How to interpret the Loan Summary

Using the default filter, Loan Summary displays information about every loan taken out by the student or PLUS borrower. If a student's parent borrowed PLUS loans on behalf of the student, those loans are also in the student's Loan Summary, even though they do not affect the student's warning icons or aggregate totals. The name of the parent taking out a PLUS loan on behalf of the student displays on the Loan Detail page for that loan.

The Loan Summary information displays the following:

- **Loan Type**—The type of Title IV award made with a formal agreement for repayment with interest. The Loan Types are defined as follows:

Program	Code	Description
FFEL	CL	FFEL Consolidation
	PL	FFEL PLUS
	RF	FFEL Refinanced
	SF	FFEL Stafford Sub or FFEL Stafford Non-Sub
	SL	Supplemental Loan (SLS)
	SU	FFEL Stafford Unsub
FDLP	D1	Direct Stafford Subsidized
	D2	Direct Stafford Unsubsidized
	D4	Direct PLUS
	D5	Direct Consolidation Unsub
	D6	Direct Consolidation Sub
	D7	Direct PLUS Consolidation
FISL	FI	Federally Insured (FISL)
PERKINS	DU	National Defense Loan
	EU	Perkins Expanded Lending
	IC	Income Contingent (ICL)

Program	Code	Description
	NU	NDSL
	PU	Federal Perkins

- **Status**—A two-character code and description indicating the status of a loan.

Code	Description
AE	Loan Transferred to New Holder
AL	Abandoned Loan
BC	Bankruptcy Claim, Discharged
BK	Bankruptcy Claim, Active
CA	Cancelled
CS	Closed School Discharge
DA	Deferred
DB	Defaulted, Then Bankrupt, Active, Chapter 13
DC	Defaulted, Compromise
DD	Defaulted, Then Died
DE	Death
DF	Defaulted, Unresolved
DI	Disability
DK	Defaulted, Then Bankrupt, Discharged, Chapter 13
DL	Defaulted, in Litigation
DN	Defaulted, Then Paid in Full By Consolidation
DO	Defaulted, Then Bankrupt, Active, Other
DP	Default, Paid in Full
DR	Defaulted Loan Included in A Rolled-Up Loan
DS	Defaulted, Then Disabled
DT	Defaulted, Collection Terminated
DU	Defaulted, Unresolved
DW	Defaulted, Write-Off
DX	Defaulted, Six Consecutive Payments
DZ	Defaulted, Six Consecutive Payments, Then Missed Payment (s)
FB	Forbearance
FC	False Certification Discharge
IA	Loan Originated
ID	In School or Grace Period

Code	Description
IG	In Grace Period
IM	In Military Grace
IP	In Post-Deferment Grace Period
IT	Loan Transferred by DCS
OD	Defaulted, Then Bankrupt, Discharged, Other
PC	Paid in Full Through Consolidation Loan
PF	Paid in Full
PM	Presumed Paid in Full
PN	Non-Defaulted, Paid in Full Through Consolidation Loan
RF	Refinanced
RH	Loan Transferred by DCS to Sallie Mae
RP	In Repayment
TG	Loan Transferred by DCS to GA927
UA	Temporarily Uninsured—No Default Claim Requested
UB	Temporarily Uninsured—Default Claim Denied
UC	Permanently Uninsured/Unreinsured—No Default Claim Requested
UD	Permanently Uninsured/Unreinsured—Default Claim Denied
UI	Unreinsured
XD	Defaulted, Six Consecutive Payments

The loan status code is blue and underlined if the student is not in default, yellow and underlined if the student is in default. The loan status codes are hyperlinks back to the Loan Status Code list above.

- **School Name and OPEID**—The school that the student attended when the loan was obtained. School Name and OPEID are not displayed for consolidation loans (CL, D5, D6, and D7) or refinanced loans (RF).
- **Guaranteed Amt** (for FFEL)—The original loan amount, before any cancellations.
- **Approved Amt** (for Direct Loans and Perkins Loans)—The original loan amount, before any cancellations.
- **Disbursed Amt**—The cumulative net amount of the loan actually disbursed to a borrower.
- **OPB (Outstanding Principal Balance)**—The cumulative dollar amount due on a loan. A red “C” icon to the left of the label indicates capitalized interest. If there is no dollar value in this field, but the loan is still in an open status, an informational icon will display

in this field. Pass your cursor over the icon for an explanation. The explanation will also display as a note at the bottom of the page.

- **Agg. OPB**—The amount that is added to the student’s aggregate Outstanding Principal Balance, and so the amount that counts against the student’s loan limits. How this value is calculated depends on the loan type and when the loan was issued.
- **Loan Date**—For FFEL, the date the loan was originally guaranteed; for Direct Loan and Perkins loans, the date the loan was originally approved.
- **Sep. Loan Ind (Separate Loan Indicator)**—An indicator used to differentiate among multiple FFEL loans awarded on the same loan date to the same borrower attending the same school. This field is used mostly by Guaranty Agencies.
- **Loan Period**—The period of study for which the loan was originally taken out.
- **Last Disbursement Date**—The date of the most recent disbursement to the borrower for a specific loan.
- **Last Disbursement Amt**—The dollar amount of the most recent disbursement to the borrower for a specific loan.
- **Acad. Lv (Academic Level)**—The student’s academic level at the time the loan was provided. The codes are defined as follows:

Code	Definition
1	Freshman/First Year (including proprietary institution programs that are less than 1 year in duration)
2	Sophomore/Second Year
3	Junior/Third Year
4	Senior/Fourth Year
5	Fifth/Other Undergraduate (may include sixth year undergraduate and continuing education students)
A	First Year Graduate/Professional
B	Second Year Graduate/Professional
C	Third Year Graduate/Professional
D	Beyond Third Year Graduate/Professional
G	Graduate/Professional, year of study unknown
N	Not available (to be used only if the date of the first disbursement is prior to July 23, 1992, and data provider does not have required attribute)


- **Additional Unsubsidized Code**—Indicates that a Direct Stafford Unsubsidized (D2) or an FFEL Stafford Unsubsidized (SU) loan was awarded as an Additional Unsubsidized loan. Additional Unsubsidized loans are identified by the following codes:
 - *P*—PLUS loan denial
 - *H*—Enrollment in eligible Health Profession programs
 - *B*—Both
- **Discharge Code**—Indicates that the loan has been discharged. Discharges are identified by the following codes:
 - *D*—Death
 - *R*—Reaffirm
 - *C*—Conditional
 - *P*—Permanent
 - *M*—Multiple
- **GA (Guaranty Agency)**—The name and code of the Guaranty Agency associated with the loan.
- **Lender**—The name and code of the lender associated with the loan.

When reviewing the Loan Summary, keep in mind the following:

- If a lock icon appears to the left of the Loan Type, the loan is batch locked.
- PLUS loans—FFEL PLUS (PL), Direct PLUS (D4), and Direct Consolidation PLUS (D7)—taken out on behalf of a student appear in the student’s Loan Summary information but do not figure into the student’s Aggregate totals. Such loans are added to the Aggregate totals on the PLUS borrower’s Loan History page.

To obtain detailed information about each loan, click the number to the left of the loan header or click the Loan Detail button to the right of the header to view the Loan Detail page for that loan. The numbering of the list is for display purposes only. Sorting or filtering the list rennumbers it.

At the bottom of the page, links are provided to view the next page of the student’s record, to view the previous page or the top of the current page, or to view the Privacy Act page. There is also a legend defining the various icons that may appear within the Loan Summary section of this page.




[Menu](#)
[Aid](#)
[Enroll](#)
[Org](#)
[Report](#)
[Support](#)


[Loan History](#)
[Overpayment History](#)
[Pell Grant](#)
[Student Access Interface](#)

SSN: First Name: DOB: (MMDDCCYY)


Logged on as: SAMUEL P BRUTCHER from [Department of Education Region 0](#)

RICHARD A SOSA

 SSN: 505-30-1060 DOB: 01/01/1900


 Defaulted

Loan History




Aggregate Loan Information

Loan Type	Outstanding Principal Balance	Pending Disbursements	Total
Subsidized Loans	N/A	N/A	N/A
Unsubsidized Loans	N/A	N/A	N/A
FFEL Consolidation Loans, Unallocated	N/A		N/A
Combined Loans	N/A	N/A	N/A
FFEL Consolidation Loans	N/A		N/A
Perkins Loans	\$609		\$609



Master Promissory Notes

MPN Type	Code	PLUS Borrower
Direct Stafford	N	N/A
Direct PLUS	N	505-30-1060



Loan Summary

Sort by:

Display Only:

Currently Sorted by LOAN DATE, No filtering

1	NU - NDSL WESTERN NEW MEXICO UNIVERSITY 00266400	Status: PE as of 07/31/2001
Approved Amt:	\$625	Disbursed Amt: \$625
Loan Date:	06/09/1987	Sep. Loan Ind:
Last Disbursement Amt: \$625		Loan Period: 01/01/1987 - 06/30/1987
Last Disbursement Date: 06/09/1987		Acad. Lv: N/A
2	PU - FEDERAL PERKINS WESTERN NEW MEXICO UNIVERSITY 00266400	Status: DU as of 04/07/1998
Approved Amt:	\$625	Disbursed Amt: \$625
Loan Date:	06/09/1987	Sep. Loan Ind:
Last Disbursement Amt: \$625		Loan Period: 01/01/1987 - 06/30/1987
Last Disbursement Date: 06/09/1987		Acad. Lv: N/A



[PRIVACY ACT OF 1974 \(AS AMENDED\)](#)

Figure 5–3, Loan History

5–12

Semiannual Delivery

5.2.1 Student/PLUS Borrower Name Search

The Student/PLUS Borrower Name Search page (Figure 5–4) allows you to search for records in the NSLDS database by complete or partial name, rather than SSN. Under Student/PLUS Borrower Name Search, you can search by first name, last name, first and last name, and by a partial or exact match type. You can also search for students or PLUS borrowers or both. A name alias is also allowed for a search.

To search by borrower name:

1. In the **Last Name** box, type the last name (e.g., for John Doe, you may type Doe, Do, or D).
2. In the Last Name **Match Type** box, click **Partial** or **Exact**.
3. In the **First Name** box, type the first name (e.g., for John Doe, you may type John, Joh, Jo, J, or Jonathon if **Aliases** is selected as the First Name Match Type).
4. In the First Name **Match Type** box, click **Partial**, **Exact**, or **Aliases**.
5. In the **Search For** box, click **Student Names Only**, **PLUS Borrower Names Only**, or **Both**.
6. Click **Retrieve**.

Under First Name Aliases, the various aliases recognized by the NSLDS for the first name typed in the Student/PLUS Borrower Name Search display, if applicable. For example, if you search on “Bill”, the First Name Aliases displays: “BILL”, “BILLE”, “BILLIE”, “BILLY”, “WLILAM”, “WILL”, “WILLAM”, “WILLE”, “WILLI”, “WILLIA”, “WILLIAM”, “WILLIAMS”, “WILLIAN”, “WILLIE”, “WILLIEMAE”, “WILLIS”, “WILLIAM”, “WM”. These are considered nicknames, likely misspellings, permutations, or full name possibilities that the NSLDS accepts for the name “Bill”.

The NSLDS will return a list of those records that match the search criteria listed above. This list is in alphabetical order by last name, then alphabetical by first name, and contains the following:

- **Last Name**—The last name on the borrower’s record.
- **First Name**—The first name on the borrower’s record.
- **MI**—The middle initial, if any, on the borrower’s record.
- **DOB**—The Date of Birth on the borrower’s record.
- **SSN**—The Social Security Number on the borrower’s record.

- **Type**—Identifies whether the record is that of a Student or PLUS borrower.
- **Cur**—Identifies whether the Name associated with the SSN is the Current name. This box displays ‘Y’ if the name is current or ‘N’ if the name is historical.

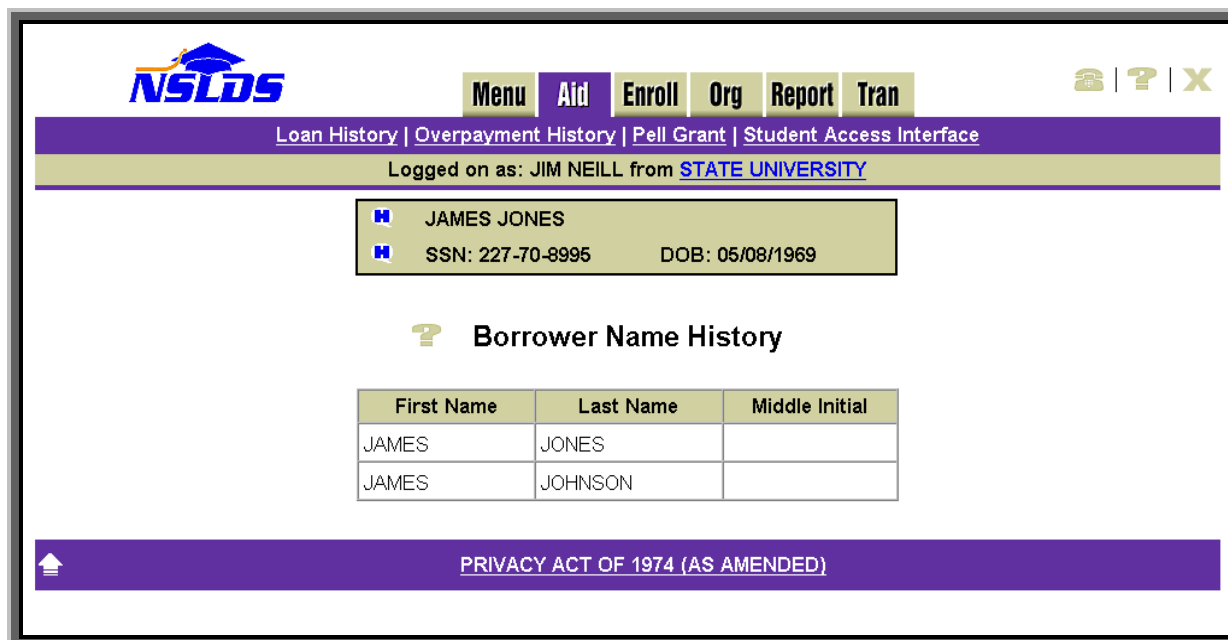
This list displays the first 50 records that match your search criteria. If there are more than 50 matches, a down arrow appears at the bottom of the page. Click the down arrow to retrieve the next 50 records. To access a student’s record, click the numbered bullet next to the name.

The screenshot shows the NSLDS web application interface. At the top left is the NSLDS logo. To its right are navigation tabs: Menu, Aid, Enroll, Org, Report, and Tran. Further right are icons for help, search, and exit. Below these is a purple banner with links: Loan History | Overpayment History | Pell Grant | Student Access Interface. A status bar below the banner indicates the user is logged on as JIM NEILL from STATE UNIVERSITY. The main heading is "Student/PLUS Borrower Name Search". Below the heading is an information icon and the instruction "Enter the search criteria and click Retrieve." The search form contains three input fields: "Last Name:", "First Name:", and "Search For:". The "Search For:" field is a dropdown menu currently set to "Student Names Only". To the right of the "Last Name:" and "First Name:" fields are "Match Type:" dropdown menus, both currently set to "Partial". A "Retrieve" button is located to the right of the "Match Type:" dropdowns. At the bottom of the form is a purple banner with a home icon and the text "PRIVACY ACT OF 1974 (AS AMENDED)".

Figure 5–4, Student/PLUS Borrower Name Search

5.2.2 Borrower Name History

The Borrower Name History page (Figure 5–5) can only be accessed by clicking the History icon next to the current Name on the Financial Aid pages. The Borrower Name History page lists name changes for a borrower in the NSLDS database. Name changes occur for various reasons, for example, when people change their last name because of marriage. The borrower’s Name, Social Security Number, and Date of Birth display in the identifier box. In the table below the identifier box, you can view the history of first and last names provided to the NSLDS. These historical names are listed with the most recent first.



NSLDS Menu Aid Enroll Org Report Tran

Loan History | Overpayment History | Pell Grant | Student Access Interface

Logged on as: JIM NEILL from [STATE UNIVERSITY](#)

JAMES JONES
SSN: 227-70-8995 DOB: 05/08/1969

Borrower Name History

First Name	Last Name	Middle Initial
JAMES	JONES	
JAMES	JOHNSON	

PRIVACY ACT OF 1974 (AS AMENDED)

Figure 5–5, Borrower Name History

5.2.3 Borrower SSN History

The Borrower SSN History page (Figure 5–6) can only be accessed by clicking the History icon next to the current SSN on the Financial Aid pages. The borrower’s Name, Social Security Number, and Date of Birth display in the identifier box. In the table below the identifier box, you can view the list of any associated Social Security Numbers the borrower has been identified with in the past. The historical SSNs are listed with the most recent first.

NSLDS Menu Aid Enroll Org Report Tran

[Loan History](#) | [Overpayment History](#) | [Pell Grant](#) | [Student Access Interface](#)

Logged on as: JIM NEILL from [STATE UNIVERSITY](#)

JAMES JONES
SSN: 227-70-8995 DOB: 05/08/1969

Borrower SSN History

SSN
229-90-8995
227-70-8995

[PRIVACY ACT OF 1974 \(AS AMENDED\)](#)

Figure 5–6, Borrower SSN History

5.3 Loan Detail

The Loan Detail page (Figure 5–7) displays historical information for a loan: loan details; loan amounts; loan activities; loan status changes; loan claim details; loan collection details; and Guaranty Agency/Lender/Servicer Agent History. It also allows you to update or delete the loan details information.

How to interpret Details for Loan

The Details for Loan table displays the following information:

- **Loan Type**—The type of Title IV award made with a formal agreement for repayment with interest. The loan types are defined as follows:

Loan Type	Definition
CL	FFEL Consolidated Loan
D1	Direct Stafford Subsidized Loan
D2	Direct Stafford Unsubsidized Loan
D4	Direct PLUS Loan
D5	Direct Consolidation Unsubsidized Loan
D6	Direct Consolidation Subsidized Loan
D7	Direct Consolidation PLUS Loan
DU	National Defense Loan
EU	Perkins Expanded Lending
FI	Federally Insured Student Loan (FISL)
IC	Income Contingent Loan (ICL)
NU	National Direct Student Loan (NDSL)
PL	FFEL PLUS Loan
PU	Federal Perkins Loan
RF	FFEL Refinanced Loan
SF	FFEL Stafford Subsidized Loan

Loan Type	Definition
SL	Supplemental Loan
SU	FFEL Stafford Unsubsidized Loan

- **Loan Period Start**—The beginning date of when classes are (or were) to begin for the period covered by the loan.
- **Loan Period End**—The ending date of when classes ended (or were to end) for the period covered by the loan.
- **Date Entered Repayment**—The date the student entered or is scheduled to enter repayment.
- **Borrowed at OPEID**—The eight-digit ED code for the school where the student was enrolled or accepted for enrollment at the time the loan was originated. “N/A” displays as the Borrowed at OPEID for consolidation loans (CL, D5, D6, D7) and FFEL refinanced loans (RF).
- **Borrowed at Name**—The name of the school where the student was enrolled or accepted for enrollment at the time the loan was originated. Click the name of the organization to link to its Organization Contact list.

“N/A” displays as the school name for consolidation loans (CL, D5, D6, D7) and FFEL refinanced loans (RF). This is in accordance with reporting requirements and has no bearing on the status of the loan. Consolidation loans may be entered into when a student completes his/her program of study at a particular school and wants to consolidate loans received from different schools.

- **Academic Level**—The student’s academic level at the time the loan was provided. The codes are defined as follows:

Code	Definition
1	Freshman/First Year (including proprietary institution programs that are less than 1 year in duration)
2	Sophomore/Second Year
3	Junior/Third Year
4	Senior/Fourth Year
5	Fifth/Other Undergraduate (may include sixth year undergraduate and continuing education students)
A	First Year Graduate/Professional

Code	Definition
B	Second Year Graduate/Professional
C	Third Year Graduate/Professional
D	Beyond Third Year Graduate/Professional
G	Graduate/Professional, year of study unknown
N	Not available (to be used only if the date of the first disbursement is prior to July 23, 1992, and data provider does not have required attribute)

- **Data Provider Loan ID**—A code used by the data provider (Guaranty Agency, Direct Loan Servicer, Debt Collection Service or Perkins school) for internal loan identification.
- **Separate Loan Ind**—An indicator used to differentiate among multiple loans of the same loan date for the same borrower or student attending the same school. This field is used mostly by Guaranty Agencies.
- **Interest Rate**—The interest rate that is applied to the loan. A variable interest rate is indicated by the abbreviation VAR.

How to interpret Amounts for Loan

The Amounts for Loan table displays the loan amount, outstanding principal balance, and outstanding interest:

- **Date**
 - **Loan**—The date the loan was originated.
 - **Outstanding Principal Balance**—The date the outstanding principal balance was updated.
 - **Outstanding Interest**—The date the outstanding interest balance was updated.
- **Amount**
 - **Loan**—The original loan amount before any cancellations.
 - **Outstanding Principal Balance**—The cumulative dollar value due on a loan.
 - **Outstanding Interest**—The cumulative accrued outstanding interest balance on the loan.
 - **Calculated Subsidized Agg. OPB**—For FFEL Consolidation loans only, the amount of the loan, calculated on the basis of the underlying loans, that counts towards a student's aggregate subsidized outstanding principal balance.

- **Calculated Unsubsidized Agg. OPB**—For FFEL Consolidation loans only, the amount of the loan, calculated on the basis of the underlying loans, that counts towards a student’s aggregate unsubsidized outstanding principal balance.
- **FFEL Consolidation, Unallocated Agg. OPB**—For FFEL Consolidation loans only, the amount of the loan, calculated on the basis of the underlying loans, that does not count towards subsidized or unsubsidized aggregate outstanding principal balance.
- **Calculated Combined Agg. OPB**—For FFEL Consolidation loans only, the amount of the loan, calculated on the basis of the underlying loans, that counts towards a student’s aggregate combined outstanding principal balance.
- **Other Fees**—The accumulated fees added to late or defaulted loans. Examples of other fees are late fees, collection costs, or court costs.

How to interpret Activities for Loan

The Activities for Loan table displays the disbursement, canceled, refund, and deferment activities for each loan. The table shows the date and amount for each activity. If the loan has no activity, the table displays N/A (not available) for the disbursements.

- **Action Date**
 - **Disbursements**—The date that the latest loan disbursement was made.
 - **Canceled**—The when all or part of the Title IV loan was canceled.
 - **Refunds**—The date that a lender received a refund from a school.
- **Amount**
 - **Disbursements**—The amount of disbursements released to a borrower.
 - **Canceled**—The cumulative amount of the Title IV loan that was canceled.
 - **Refunds**—The amount of refund paid to a lender on a loan.
- **Start Date**
 - **Deferments**—The date when a legal deferment actually begins.
- **End Date**
 - **Deferments**—The date when a legal deferment is projected to end or actually ends. Includes post-deferment grace period if applicable.
 - **Type**

Deferments—One of the legal reasons for postponing repayment of loan principal and interest. The codes for the deferment types are defined as follows:

Deferment Type	Description
AC	Action Programs
AP	Armed Forces or PHS
EH	Economic Hardship
EP	Full-Time Family Service To High Risk
FM	Full-Time Teacher Of Math
FN	Full-Time Nurse/Medical Tech
FP	Full-Time Provider
FS	Full-Time Special Ed Teacher
FT	Full-Time Student
GF	Graduate Fellowship Program
HD	Head Start
HS	Hardship
HT	Half-Time Student
IR	Internship/Residency
LE	Law Enforcement
LF	Deferred Pending Loan Forgiveness Cancellation
NO	National Oceanic and Atmospheric Administration Corps
PC	Peace Corps
PL	Parental Leave
PP	Parental PLUS Borrower
RT	Rehabilitation Training
TD	Temporary Disability
TE	Tax-Exempt Organizations
TL	Teacher Low-Income Institution
TS	Teacher Shortage

Deferment Type	Description
UE	Unemployment Less Than 3 Years
UN	Unemployment Less Than 2 Years
WM	Working Mother

How to interpret Status Changes for Loan

The Status Changes for Loan table displays a history of the loan status codes and the dates the statuses became effective for the loan. The most current loan status and effective date are displayed at the top of the list:

- **Date Changed**—The date a loan status first became effective, with no interruptions. (This date is not necessarily the date the status was reported to the NSLDS. A loan status may have changed but not been updated in NSLDS for various reasons until months or years after the fact.)
- **Status**—The two-character code and description indicating the status of a loan. The loan status codes are defined as follows:

Loan Status Code	Definition
AL	Abandoned Loan
BC	Bankruptcy Claim, Discharged
BK	Bankruptcy Claim, Active
CA	Canceled
CS	Closed School Discharge
DA	Deferred
DB	Defaulted, Then Bankrupt, Active, Chapter 13
DC	Defaulted, Compromise
DD	Defaulted, Then Died
DE	Death
DF	Defaulted, Unresolved
DI	Disability
DK	Defaulted, Then Bankrupt, Discharged,

Loan Status Code	Definition
	Chapter 13
DL	Defaulted, In Litigation
DN	Defaulted, Paid in Full Through Consolidation Loan
DO	Defaulted, Then Bankrupt, Active, other
DP	Defaulted, Paid in Full
DR	Defaulted Loan Included in Roll-Up Loan
DS	Defaulted, Then Disabled
DT	Defaulted, Collection Terminated
DU	Defaulted Unresolved
DW	Defaulted, Write-off
DX	Defaulted, Six Consecutive Payments
DZ	Defaulted, Six Consecutive Payments, then missed payment
FB	Forbearance
FC	False Certification Discharge
IA	Loan Originated
ID	In School or Grace Period
IG	In Grace Period
IM	In Military Grace
IP	In post-deferment grace (Perkins only)
OD	Defaulted, Then Bankrupt, Discharged, Other
PC	Paid in Full Through Consolidation Loan
PF	Paid in Full
PM	Presumed Paid in Full
PN	Non-defaulted, Paid in Full Through Consolidation Loan
RF	Refinanced
RP	In Repayment
UA	Temporarily Uninsured - No Default Claim Requested
UB	Temporarily Uninsured - Default Claim

Loan Status Code	Definition
	Denied
UC	Permanently Uninsured - No Default Claim Requested
UD	Permanently Uninsured - Default Claim Denied
UI	Uninsured/Unreinsured
XD	Defaulted, six consecutive payments

How to interpret Claim Details for Loan

The Claim Details for Loan table displays the following information:

- **Date**
 - **Insurance Claim Payment**—The date when a Guaranty Agency paid an insurance claim or supplemental claim to a lender. (The *Loan Record Detail Report (LRDR)* may show an insurance claim payment date that is different than the one that displays here.)
 - **Insurance Claim Refund**—The date when a Guaranty Agency received an insurance claim refund from a lender.
 - **Reinsurance Claim Payment**— The date when a Guaranty Agency requested reinsurance.
 - **Bankruptcy Claim Refund**—The date when a bankruptcy claim (previously paid as a reinsurance claim) was refunded to ED by a Guaranty Agency.
 - **Supplemental Reinsurance Payment Request**—The date when a supplemental reinsurance claim request is submitted to ED by a Guaranty Agency.
 - **Repurchase Amount**—The date when a loan previously paid by a claim is repurchased by a lender (reasons may include loan rehabilitation).
- **Cumulative Amount**
 - **Insurance Claim Payment**—The cumulative amount of principal and interest including supplemental claims paid to a lender by a Guaranty Agency for an insurance claim on an FFELP loan. Amount does not include claims that were made prior to repurchase.
 - **Insurance Claim Refund**—The cumulative dollar amount of refund(s) from a lender to a Guaranty Agency. Refunds may occur because of an overpayment of a claim, late refunds from the institution to the lender, or borrower payments to the lender after default and prior to the request for reinsurance. If reinsurance has been requested from ED, report the

amount as a collection. Amount does not include refunds that were made prior to repurchase.

- **Reinsurance Claim Payment**—The dollar amount of a reinsurance claim requested of ED by a Guaranty Agency. Amount does not include claims that were made prior to repurchase.
- **Bankruptcy Claim Refund**—The cumulative amount remitted to ED for bankruptcy claim refund(s) on a loan. A guarantor refunds reinsurance to ED after the following sequence of events: the guarantor pays a bankruptcy claim to a lender before the bankruptcy court decides whether the loan is discharged; the guarantor collects reinsurance from ED; and the loan is *not* discharged by bankruptcy court. Amount does not include refunds that were made prior to repurchase.
- **Supplemental Reinsurance Payment Request**—The cumulative dollar amount of supplemental reinsurance claim request(s) of ED by a Guaranty Agency. Amount does not include requests that were made prior to repurchase.
- **Repurchase Amount**—The total (non-cumulative) amount paid to a Guaranty Agency by a lender when an FFELP loan is repurchased (including repurchases of bankruptcy claims).
- **Reason Code**
 - **Insurance Claim Payment**—The code indicating the reason the latest insurance claim, including supplemental claims, was paid to a lender.
 - **Reinsurance Claim Payment**—The code indicating the reason the latest reinsurance claim, including supplemental insurance, was paid to a Guaranty Agency.

The reason codes include the following:

Reason Code	Description
IX	Direct Loan Default
IN	Income Contingent Negative Amortization
FC	False Certification
EX	Exempt
BO	Bankruptcy, Other
BC	Bankruptcy, Chapter 13
DI	Disability
DF	Default

Reason Code	Description
DE	Death
CS	Closed School

- **Paid Date.**
 - **Reinsurance Claim Payment**—The date when the government pays a reinsurance claim to a guaranty agency.
- **Rate Code**
 - **Reinsurance Claim Payment**—The code indicating the rate at which the government paid a claim to a Guaranty Agency on a specific loan. The rate codes include: Code 1 (100%); Code 2 (90%); Code 3 (80%); and Code 0 (0%).
- **Ind. of Rehab.**
 - **Repurchase Amount**—The indicator that a repurchased loan was a rehabilitated loan (that is, a defaulter made 12 consecutive payments on the loan and that it was sold to a lender by a Guaranty Agency). A ‘Y’ for yes or ‘N’ for no displays.

How to interpret Collection Details for Loan

The Collection Details for Loan table displays the following:

- **Date**
 - **TOP**—The date when the Guaranty Agency last applied TOP (formerly IRS) offset principal and/or interest collections to a loan.
 - **Collection**—The date when the Guaranty Agency last applied default collections (excluding TOP [formerly IRS] offset) or bankruptcy recovery to the loan principal and/or interest.
- **Cumulative Principal Amount**
 - **TOP**— The cumulative amount collected and applied to principal through TOP (formerly IRS) offset. Amount does not include collections that were made prior to repurchase.
 - **Collection**—The cumulative amount of Guaranty Agency default collections (excluding TOP [formerly IRS] collections) or bankruptcy recovery applied to loan principal. Amount does not include collections that were made prior to repurchase. Collections such as administrative wage garnishment (AWG) and state tax offsets are included.
- **Cumulative Interest Amount**
 - **TOP**—The cumulative amount collected and applied to interest through TOP (formerly IRS) offset. Amount does not include collections that were made prior to repurchase.

- **Collection**—The cumulative amount of Guaranty Agency default collections (excluding TOP [formerly IRS] collections) or bankruptcy recovery applied to loan interest. Amount does not include collections that were made prior to repurchase. Collections such as administrative wage garnishment (AWG) and state tax offsets are included.

How to interpret Guaranty Agency/Lender/Servicer Agent History

The Guaranty Agency/Lender/Servicer Agent History table displays a history of the holders of the loan:

- **Start**
 - **Guaranty Agency**—The date the agency started overseeing the loan.
 - **Lender**—The date the lender started holding the loan.
 - **Servicer Agent**—The date the agent started servicing the loan.
- **End**
 - **Guaranty Agency**—The date the agency stopped overseeing the loan. The value of Current indicates the agency is overseeing the loan now.
 - **Lender**—The date the lender stopped holding the loan. The value of Current indicates the lender is holding the loan now.
 - **Servicer Agent**—The date the servicing agent stopped servicing the loan. The value of Current indicates the agent is servicing the loan now.
- **Code**—An ED-assigned number for each GA, Lender, or Servicer Agent for the specified loan.
- **Name**—The name of the GA, Lender, or Servicer Agent for the specified loan. Click the name of the Guaranty Agency, Lender, or Servicer Agent to link to its Organization Contact List.

When viewing the Loan Detail page, keep in mind the following:

- PLUS Loan information may appear at the top of this page below the Identifier information. It displays either the PLUS borrower's or the student's Name, SSN, and DOB (that is, you can view information on this loan by either typing the PLUS borrower's SSN or by typing the child's SSN when accessing Loan History).
- A PLUS Loan is a loan whereby the borrower is a parent who borrows on behalf of a student. Any PLUS loans appear on the student's Loan History. They are not added into

the student's aggregate amounts, nor does a default status on any PLUS loans prevent a student from borrowing for him or herself.

[Menu](#) | [Aid](#) | [Enroll](#) | [Org](#) | [Report](#) | [Tran](#)

[Loan History](#) | [Overpayment History](#) | [Pell Grant](#) | [Student Access Interface](#)

Logged on as: SAM BRUTCHER from [ALLAN HANCOCK COLLEGE](#)

[Return To Loan History](#)

CAROL R WALKER
 SSN: 333-99-3747 DOB: 01/03/1973

Details for Loan 1

Loan Type:	CL - FFEL CONSOLIDATED		
Loan Period Start:	N/A	Academic Level:	N/A
Loan Period End:	N/A	Data Provider Loan ID:	N/A
Date Entered Repayment:	07/20/2001	Separate Loan Ind:	B
Borrowed at OPEID:	88888800	Interest Rate:	6.25% FIXED
Borrowed at Name:	DEFAULT SCHOOL FOR CONSOLIDATED LOANS		

Amounts for Loan 1

	Date	Amount
Loan:	07/20/2001	\$5,829
Outstanding Principal Balance:	11/30/2002	\$6,147
Outstanding Interest:	11/30/2002	\$21
Calculated Subsidized Amount:		\$4,802
Calculated Unsubsidized Amount:		\$316
Calculated Combined Amount:		\$5,119
Calculated CL Remaining Amount:		\$710
Other Fees:		\$0

Activities for Loan 1

Action Date	Amount
Disbursements	
07/20/2001	\$5,829

Claim Details for Loan 1

	Date	Cumulative Amount	Reason Code	Date Paid	Rate Code	Ind. of Rehab.
Insurance Claim Payment:	N/A	N/A	N/A			
Insurance Claim Refund:	N/A	N/A				
Reinsurance Claim Payment:	N/A	N/A	N/A	N/A	N/A	
Bankruptcy Claim Refund:	N/A	N/A				
Supplemental Reinsurance Payment Request:	N/A	N/A				
Repurchase:	N/A	N/A				N/A

Collection Details for Loan 1

	Date	Cumulative Principal Amount	Cumulative Interest Amount
TOP:	N/A	N/A	N/A
Collection:	N/A	N/A	N/A

Guaranty Agency / Lender / Servicer Agent History

There is no Guaranty Agency/Lender/Servicer Agent History

[PRIVACY ACT OF 1974 \(AS AMENDED\)](#)

Figure 5–7, Loan Detail

5.4 Loan Detail Update

The Loan Detail Update page (Figure 5–8) allows you to update the following data for FFEL loans: student and PLUS borrower identifiers; loan details; loan amounts; loan activities; loan status changes; loan claim details; loan collection details; and Guaranty Agency/Lender/Servicer Agent History. It also allows you to lock the loan as it currently displays without updates, or lock the loan with the updates that you submit to NSLDS.

Each data item on the Loan Detail Update page is accessed using an associated pop-up window. Detailed instructions for using pop-up windows are provided in Section 5.5.

Note: The Loan Detail Update page is available only to selected Guaranty Agency users. Access to this page is limited to two people from each agency. These users are expected to have comprehensive knowledge of the agency's internal systems and NSLDS extract processes. In addition, NSLDS requires each user to complete a training course before granting them access to the online update functions.

How to lock the loan

To lock the loan as it currently displays:

1. Click **Lock Loan** at the top of the page.
2. The loan is locked. The lock icon appears on the Loan History page.

How to update the Student Identifiers information

To update the Student Identifiers information:

1. Click **Update Identifiers**.
2. The Update Student Identifiers pop-up window displays (Section 5.5.1).
3. Make updates in the Update Student Identifiers pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to update the PLUS Borrower Identifiers information

To update the PLUS Borrower Identifiers information:

1. Click **Update PLUS Borrower Identifiers**.
2. The Update PLUS Borrower pop-up window displays (Section 5.5.2).
3. Make updates in the Update PLUS Borrower pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to update the Detail for Loan information

To update the Detail for Loan information:

1. Click **Update Loan Details**.
2. The Update Loan Details pop-up window displays (Section 5.5.3).
3. Make updates in the Update Loan Detail pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to update the Amounts for Loan information

To update the Amounts for Loan information:

1. Click **Update Loan Amounts**.
2. The Update Loan Amounts pop-up window displays (Section 5.5.4).
3. Make updates in the Update Loan Amounts pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

5.4.1 Activity for Loan

How to add the Disbursements information

To add the Disbursements information:

1. Click **Add**.
2. The Add Disbursement pop-up window displays (Section 5.5.5).
3. Type/select information in the Add Disbursement pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to update the Disbursements information

To update the Disbursements information:

1. Click **Update**.
2. The Update Disbursements pop-up window displays (Section 5.5.6).
3. Make updates in the Update Disbursements pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to add the Canceled information

To add the Canceled information:

1. Click **Add**.
2. The Add Cancellation pop-up window displays (Section 5.5.7).
3. Type/select information in the Add Cancellation pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to update the Canceled information

To update the Canceled information:

1. Click **Update**.
2. The Update Cancellation pop-up window displays (Section 5.5.8).
3. Make updates in the Update Cancellation pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to add the Refunds information

To add the Refunds information:

1. Click **Add**.
2. The Add Refund pop-up window displays (Section 5.5.9).
3. Type/select information in the Add Refund pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to update the Refunds information

To update the Refunds information:

1. Click **Update**.
2. The Update Refunds pop-window displays (Section 5.5.10).
3. Make updates in the Update Refunds pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to add the Deferments information

To add the Deferments information:

1. Click **Add**.
2. The Add Deferment pop-up window displays (Section 5.5.11).
3. Type/select information in the Add Deferment pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to update the Deferments information

To update the Deferments information:

1. Click **Update**.
2. The Update Deferments pop-up window displays (Section 5.5.12).
3. Make updates in the Update Deferments pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

5.4.2 Status Changes for Loan

How to add the Status information

To add the Status information:

1. Click **Add Loan Status**.
2. The Add Loan Status pop-up window displays (Section 5.5.13).
3. Type/select information in the Add Loan Status pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to update the Status information

To update the Status information:

1. Click **Update Loan Status**.
2. The Update Status pop-up window displays (Section 5.5.14).
3. Make updates in the Update Status pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

5.4.3 Claim Details

How to add the Insurance Claim Payment information

To add the Insurance Claim Payment information:

1. Click **Add**.
2. The Add Insurance Claim Payment pop-up window displays (Section 5.5.15).
3. Type/select information in the Add Insurance Claim Payment pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to update the Insurance Claim Payment information

To update the Insurance Claim Payment information:

1. Click **Update**.
2. The Update Insurance Claim Payment pop-up window displays (Section 5.5.16).
3. Make updates in the Update Insurance Claim Payment pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to add the Insurance Claim Refund information

To add the Insurance Claim Refund information:

1. Click **Add**.
2. The Add Insurance Claim Refund pop-up window displays (Section 5.5.17).
3. Type/select information in the Add Insurance Claim Refund pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to update the Insurance Claim Refund information

To update the Insurance Claim Refund information:

1. Click **Update**.
2. The Update Insurance Claim Refund pop-up window displays (Section 5.5.18).
3. Make updates in the Update Insurance Claim Refund pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to add the Reinsurance Claim Payment information

To add the Reinsurance Claim Payment information:

1. Click **Add**.
2. The Add Reinsurance Claim Payment pop-up window displays (Section 5.5.19).
3. Type/select information in the Add Reinsurance Claim Payment pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to update the Reinsurance Claim Payment information

To update the Reinsurance Claim Payment information:

1. Click **Update**.
2. The Update Reinsurance Claim Payment pop-up window displays (Section 5.5.20).
3. Make updates in the Update Reinsurance Claim Payment pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to add the Bankruptcy Claim Refund information

To add the Bankruptcy Claim Refund information:

1. Click **Add**.
2. The Add Bankruptcy Claim Refund pop-up window displays (Section 5.5.21).
3. Type/select information in the Add Bankruptcy Claim Refund pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to update the Bankruptcy Claim Refund information

To update the Bankruptcy Claim Refund information:

1. Click **Update**.
2. The Update Bankruptcy Claim Refund pop-up window displays (Section 5.5.22).
3. Make updates in the Update Bankruptcy Claim Refund pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to add the Supplemental Reinsurance Payment Request information

To add the Supplemental Reinsurance Payment Request information:

1. Click **Add**.
2. The Add Supplemental Reinsurance Claim Payment pop-up window displays (Section 5.5.23).
3. Type/select information in the Add Supplemental Reinsurance Claim Payment pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to update the Supplemental Reinsurance Payment Request information

To update the Supplemental Reinsurance Payment Request information:

1. Click **Update**.
2. The Update Supplemental Reinsurance Payment Request pop-up window displays (Section 5.5.24).
3. Make updates in the Update Supplemental Reinsurance Payment Request pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to add the Repurchase Amount information

To add the Repurchase Amount information:

1. Click **Add**.
2. The Add Repurchase Amount pop-up window displays (Section 5.5.25).
3. Type/select information in the Add Repurchase Amount pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to update the Repurchase Amount information

To update the Repurchase Amount information:

1. Click **Update**.
2. The Update Repurchase Amount pop-up window displays (Section 5.5.26).
3. Make updates in the Update Repurchase Amount pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

5.4.4 Collection Details for Loan

How to add the TOP Offset information

To add the TOP Offset information:

1. Click **Add**.
2. The Add TOP (Treasury Offset Program) pop-up window displays (Section 5.5.27).
3. Type/select information in the Add TOP (Treasury Offset Program) pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to update the TOP Offset information

To update the TOP Offset information:

1. Click **Update**.
2. The Update TOP (Treasury Offset Program) pop-up window displays (Section 5.5.28).
3. Make updates in the Add TOP (Treasury Offset Program) pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to add the Collection Principal information

To add the Collection Principal information:

1. Click **Add**.
2. The Add Collection pop-up window displays (Section 5.5.29).
3. Type/select information in the Add Collection pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to update the Collection Principal information

To update the Collection Principal information:

1. Click **Update**.
2. The Update Collection pop-up window displays (Section 5.5.30).
3. Make updates in the Update Collection pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

5.4.5 Guaranty Agency/Lender/Service Agent History

How to transfer the Guaranty Agency information

To transfer the Guaranty Agency information:

1. Click **Transfer**.
2. The Transfer Guaranty Agency for Loan pop-up window displays (Section 5.5.31).
3. Type/select information in the Transfer Guaranty Agency for Loan pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to update the Guaranty Agency information

To update the Guaranty Agency information:

1. Click **Update**.
2. The Update Guaranty Agency for Loan pop-up window displays (Section 5.5.32).
3. Make updates in the Update Guaranty Agency for Loan pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to add the Lender information

To add the Lender information:

1. Click **Add**.
2. The Add Lender for Loan pop-up window displays (Section 5.5.33).
3. Type/select information in the Add Lender for Loan pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to update the Lender information

To update the Lender information:

1. Click **Update**.
2. The Update Lender for Loan pop-up window displays (Section 5.5.34).
3. Make updates in the Update Lender for Loan pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to add the Servicer Agent information

To add the Servicer Agent information:

1. Click **Add**.
2. The Add Servicer Agent for Loan pop-up window displays (Section 5.5.35).
3. Type/select information in the Add Servicer Agent for Loan pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

How to update the Servicer Agent information

To update the Servicer Agent information:

1. Click **Update**.
2. The Update Servicer Agent for Loan pop-up window displays (Section 5.5.36).
3. Make updates in the Update Servicer Agent for Loan pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click Cancel to return to the Loan Detail page without updating any information.

When updating information on the Loan Detail Update page, keep in mind the following:

- If you have to make updates in different sections, you may make the updates in all the sections first, and then submit the updates to NSLDS all at once. For example, if you need to update the Detail for Loan, Amounts for Loan, Activity for Loan, Claim Details, and Collection Details sections, you may update the information in each first, and then submit the updates to NSLDS at the bottom of the page.
- The status icons (*New*, *Revised*, *Delete*) display next to information to indicate what type of update has occurred. If you add information, the New icon displays. If you update information, the Revised icon displays. If you delete information, a line is drawn through the information. The status icons display until your NSLDS session ends. For example, if you add information during one session it will have a New icon next to it. During the next session that information does not have a New icon next to it.

NSLDS Menu Aid Enroll Org Report Tran
 Loan History | Overayment History | Pell Grant | Student Access Interface
 Logged on as: SAM BRUTCHER from PENNSYLVANIA HIGHER EDUC. ASST. AGENCY

MARY ANNIE M TURNER
 Pseudo Indicator: R
 SSN: 351-00-0004 DOB: 12/01/1965

Lock Loan Update Identifiers

Detail for Loan 1

Update Loan Details

Loan Type:	CF - FFEL Stafford Subsidized Loan
Loan Period Start:	09/30/1986 Academic Level: 4
Loan Period End:	05/31/1987 Date Provider Loan ID: N/A
Date Entered:	02/28/1992 Separate Loan Ind: A
Borrowed at OPEID:	00258700 Interest Rate: 0.00%
Borrowed at Name:	SAINT ANSELM COLLEGE

Amounts for Loan 1

Update Loan Amounts

	Date	Amount
Loan:	07/31/1986	\$2,000
Outstanding Principal Balance:	06/30/1992	\$0
Outstanding Interest:	N/A	\$0
Other Fees:		\$0

Activity for Loan 1

Event Date	Cumulative Amount
Add Disbursements	N/A
Add Cancellations	N/A
Add Deferments	N/A
Start Date	End Date Type

Status Changes for Loan 1

Add Loan Status Update Loan Status

Date Changed	Status
06/30/1992	PF

Claim Detail 1

	Date	Cumulative Amount	Reason Code	Paid Date	Rate	Ind. of Rehab.
Add Insurance Claim Payment:	N/A	N/A	N/A			
Add Insurance Claim Refund:	N/A	N/A				
Add Reinsurance Claim Payment:	N/A	N/A	N/A	N/A	N/A	N/A
Add Bankruptcy Claim Refund:	N/A	N/A				
Add Supplemental Reinsurance Payment Request:	N/A	N/A				
Add Repurchase Amount:	N/A	N/A				N/A

Collection Detail 1

	Date	Cumulative Principal Amount	Cumulative Interest Amount
Add Update Collection Principal:	01/15/2001	\$54	\$5

Guaranty Agency / Lender / Servicer Agent History

Start	End	Code	Name
Transfer Update			Guaranty Agency
07/31/1986	CURRENT	733	New Hampshire Higher Education Asst.
Add Update			Lender
07/31/1986	06/29/1992	827456	MILFORD CO-OP BANK
Add			Servicer Agent
N/A			

Submit and Lock Submit without Lock Cancel

PRIVACY ACT OF 1974 (AS AMENDED)

Figure 5–8, Loan Detail Update

5.5 Loan Detail Update Pop-Ups

Each data item on the Loan Detail Update page is accessed using an associated pop-up window. This section describes each pop-up window and provides instructions for its use.

5.5.1 Update Student Identifiers

The Update Student Identifiers pop-up window (Figure 5–9) allows you to update the Student Identifiers information.

How to update the Student Identifiers information

To update the Student Identifiers information, you may type over or re-select the information that already displays in the text boxes:

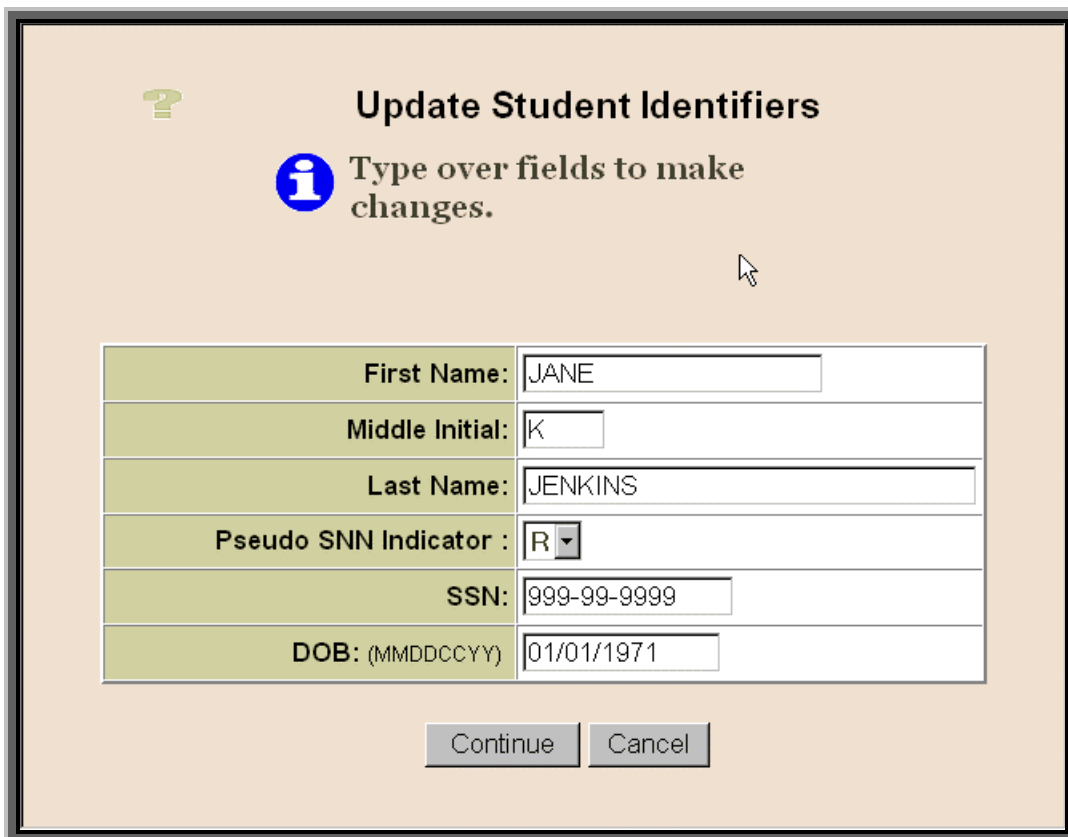
1. In the **First Name** box, type the student's first name.
2. In the **Middle Initial** box, type the student's middle initial.
3. In the **Last Name** box, type the student's last name.
4. In the **Pseudo SSN Indicator** box, click a selection from the list.
5. In the **SSN** box, type the student's Social Security Number (SSN).
6. In the **DOB (MMDDCCYY)** box, type the student's date of birth (DOB).
7. Click **Continue** to return to the Loan Detail Update page, which displays the updated information. To submit the updated information to NSLDS, refer to the Loan Detail Update Help page.
8. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Update Student Identifiers information

The Update Student Identifiers information is defined as follows:

- **First Name**—The student's first name. (This is field code 23 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Middle Initial**—The student's middle initial. (This is field code 79 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)

- **Last Name**—The student’s last name. (This is field code 76 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Pseudo SSN Indicator**—Indicates whether the student has a real SSN (‘R’) or a pseudo SSN (‘P’). (This is field code 74 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **SSN**—The student’s Social Security Number. (This is field code 21 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **DOB (MMDDCCYY)**—The student’s date of birth. (This is field code 22 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)



The image shows a 'Update Student Identifiers' pop-up window. At the top, there is a green question mark icon and the title 'Update Student Identifiers'. Below the title is an information icon (a blue circle with a white 'i') followed by the text 'Type over fields to make changes.' A mouse cursor is visible near this text. The main area of the pop-up contains a table with six rows, each representing a student identifier field. The first five rows have a light green background for the label, and the last row has a light yellow background. Each row has a text input field to its right. At the bottom of the pop-up are two buttons: 'Continue' and 'Cancel'.

First Name:	JANE
Middle Initial:	K
Last Name:	JENKINS
Pseudo SNN Indicator :	R
SSN:	999-99-9999
DOB: (MMDDCCYY)	01/01/1971

Continue Cancel

Figure 5–9, Update Student Identifiers Pop-Up

5.5.2 Update PLUS Borrower Identifiers

The Update PLUS Borrower pop-up window (Figure 5–10) allows you to update the PLUS Borrower Identifiers information.

How to update the PLUS Borrower Identifiers information

To update the PLUS Borrower Identifiers information, you may type over or re-select the information that already displays in the text boxes:

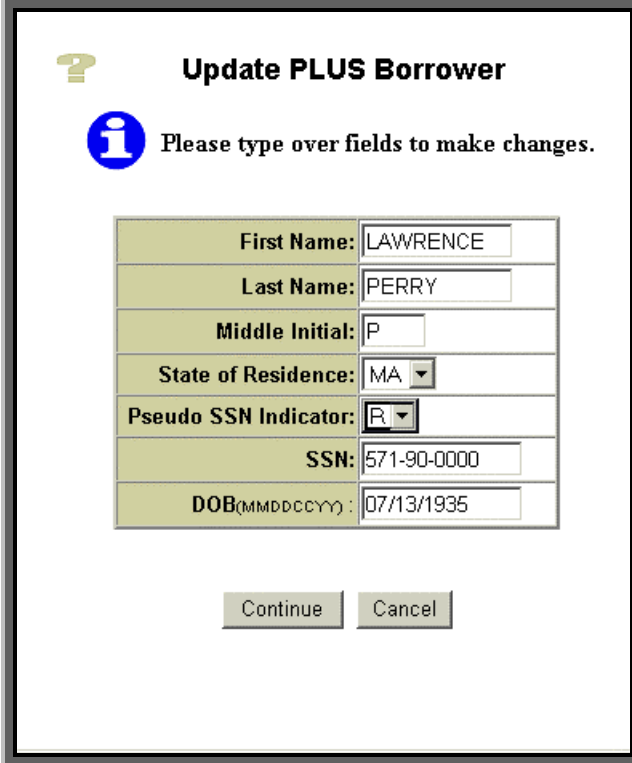
1. In the **First Name** box, type the PLUS Borrower's first name.
2. In the **Last Name** box, type the PLUS Borrower's last name.
3. In the **Middle Initial** box, type the PLUS Borrower's middle initial.
4. In the **State of Residence** box, click a selection from the list.
5. In the **Pseudo SSN Indicator** box, click a selection from the list.
6. In the **SSN** box, type the PLUS borrower's Social Security Number (SSN).
7. In the **DOB (MMDDCCYY)** box, type the PLUS Borrower's date of birth (DOB).
8. Click **Continue** to return to the Loan Detail Update page, which displays the updated information. To submit the updated information to NSLDS, refer to the Loan Detail Update Help page.
9. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Update PLUS Borrower Identifiers information

The Update PLUS Borrower Identifiers information is defined as follows:

- **First Name**—The PLUS Borrower's first name. (This is field code 71 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Last Name**—The PLUS Borrower's last name. (This is field code 72 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Middle Initial**—The PLUS Borrower's middle initial. (This is field code 86 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)

- **State of Residence**—The code for a PLUS borrower’s permanent state of residence at the time the loan was guaranteed. (This is field code 87 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Pseudo SSN Indicator**—Indicates whether the PLUS Borrower has a real SSN (‘R’) or a pseudo SSN (‘P’). (This is field code 70 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **SSN**—The PLUS Borrower’s Social Security Number. (This is field code 28 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **DOB (MMDDCCYY)**—The PLUS Borrower’s date of birth. (This is field code 73 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)



Update PLUS Borrower

Please type over fields to make changes.

First Name:	LAWRENCE
Last Name:	PERRY
Middle Initial:	P
State of Residence:	MA
Pseudo SSN Indicator:	R
SSN:	571-90-0000
DOB(MMDDCCYY):	07/13/1935

Continue Cancel

Figure 5–10, Update PLUS Borrower Pop-Up

5.5.3 Update Loan Details

The Update Loan Details pop-up window (Figure 5–11) allows you to update the Loan Details information.

How to update the Loan Details information

To update the Loan Details information, you may type over or re-select the information that already displays in the text boxes:

1. In the **Loan Type** box, click a selection from the list.
2. In the **Loan Period Start (MMDDCCYY)** box, type a date.
3. In the **Loan Period End (MMDDCCYY)** box, type a date.
4. In the **Date Entered Repayment (MMDDCCYY)** box, type a date.
5. In the **Borrowed at OPEID** box, type a code. Click **Search** to search for a code.
6. In the **Academic Level** box, click a selection from the list.
7. In the **Data Provider Loan ID** box, type a Data Provider Loan ID (optional).
8. In the **Separate Loan Ind** box, type an indicator.
9. In the **Interest Rate (%)** box, type an interest rate.
10. In the **Interest Rate (type of rate)** box, click a selection.
11. Click **Continue** to return to the Loan Detail Update page, which displays the updated information. To submit the updated information to NSLDS, refer to the Loan Detail Update Help page.
12. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Loan Details information

The Loan Details information is defined as follows:

- **Loan Type**—The type of Title IV award made with a formal agreement for repayment with interest. (This is field code 24 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)

The loan types are defined as follows:

Loan Type	Definition
CL	FFEL Consolidated Loan
D1	Direct Stafford Subsidized Loan
D2	Direct Stafford Unsubsidized Loan
D4	Direct PLUS Loan
D5	Direct Consolidation Unsubsidized Loan
D6	Direct Consolidation Subsidized Loan
D7	Direct Consolidation PLUS Loan
DU	National Defense Loan
EU	Perkins Expanded Lending
FI	Federally Insured Student Loan (FISL)
IC	Income Contingent Loan (ICL)
NU	National Direct Student Loan (NDSL)
PL	FFEL PLUS Loan
PU	Federal Perkins Loan
RF	FFEL Refinanced Loan
SF	FFEL Stafford Subsidized Loan
SL	Supplemental Loan (SL)
SU	FFEL Stafford Unsubsidized Loan


- **Loan Period Start (MMDDCCYY)**—The beginning date of when classes are (or were) to begin for the period covered by the loan. (This is field code 77 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Loan Period End (MMDDCCYY)**—The ending date of when classes ended (or were to end) for the period covered by the loan. (This is field code 78 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Date Entered Repayment (MMDDCCYY)**—The date the student entered or is scheduled to enter repayment. (This is field code 60 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Borrowed at OPEID**—The eight-digit ED code for the school where the student was enrolled or accepted for enrollment at the time the loan was originated. (This is field code 27 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)

- **Academic Level**—The student’s academic level at the time the loan was provided. (This is field code 75 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)


The academic level codes are defined as follows:

Code	Definition
1	Freshman/First Year (including proprietary institution programs that are less than 1 year in duration)
2	Sophomore/Second Year
3	Junior/Third Year
4	Senior/Fourth Year
5	Fifth/Other Undergraduate (may include sixth year undergraduate and continuing education students)
A	First Year Graduate/Professional
B	Second Year Graduate/Professional
C	Third Year Graduate/Professional
D	Beyond Third Year Graduate/Professional
G	Graduate/Professional, year of study unknown
N	Not available (to be used only if the date of the first disbursement is prior to July 23, 1992, and data provider does not have required attribute)

- **Data Provider Loan ID**—A code used by the data provider (Guaranty Agency, Direct Loan Servicer, Debt Collection Service, or Perkins school) for internal loan identification. This is optional for this page. (This is field code 193 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Separate Loan Ind**—An indicator used to differentiate among multiple loans of the same loan date for the same borrower or student attending the same school. (This is field code 26 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Interest Rate**—The original interest rate on a loan, unless the loan was subject to a rebate of excess interest and was converted from a fixed rate to a variable rate through that process or was refinanced (PLUS or SLS) to secure a variable rate. (This is field code 143 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Type of Interest Rate**—The code indicating the type of interest rate on an FFELP loan. A variable interest rate is indicated by the abbreviation VAR. (This is field code 144 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)



Update Loan Details

 Please type over fields to make changes.

Loan Type:	<input type="text" value="SF - FFEL Stafford Subsidized Loan"/>		
Loan Period Start: (MMDDCCYY)	<input type="text" value="01/01/1988"/>	Academic Level:	<input type="text" value="1"/>
Loan Period End: (MMDDCCYY)	<input type="text" value="01/01/1992"/>	Data Provider Loan ID:	<input type="text" value="N/A"/>
Date Entered Repayment: (MMDDCCYY)	<input type="text" value="01/01/1993"/>	Separate Loan Ind:	<input type="text" value="A"/>
Borrowed at OPEID:	<input type="text" value="00094300"/> <input type="button" value="Search"/>	Interest Rate:	<input type="text" value="5"/> % <input type="text" value="FIXED"/>

Figure 5–11, Update Loan Details Pop-Up

5.5.4 Update Loan Amounts

The Update Loan Amounts pop-up window (Figure 5–12) allows you to update the Loan Amounts information.

How to update the Loan Amounts information

To update the Loan Amounts information, you may type over the information that already displays in the text boxes:


1. In the **Loan** box under the **Date (MMDDCCYY)** column, type a date.
2. In the **Loan** box under the **Amount** column, type an amount (do not use a \$ or a decimal).
3. In the **Outstanding Principal Balance** box under the **Date (MMDDCCYY)** column, type a date.
4. In the **Outstanding Principal Balance** box under the **Amount** column, type an amount (do not use a \$ or a decimal).
5. In the **Outstanding Interest** box under the **Date (MMDDCCYY)** column, type a date.
6. In the **Outstanding Interest** box under the **Amount** column, type an amount (do not use a \$ or a decimal).
7. In the **Other Fees** box under the **Amount** column, type an amount (do not use a \$ or a decimal).
8. Click **Continue** to return to the Loan Detail Update page, which displays the updated information. To submit the updated information to NSLDS, refer to the Loan Detail Update Help page.
9. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Update Loan Amounts information


The Update Loan Amounts information is defined as follows:

- **Date (MMDDCCYY)**
 - **Loan**—The date when an FFELP loan was originally guaranteed. (This is field code 25 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)

- **Outstanding Principal Balance**—The date the outstanding principal balance was updated. (This is field code 135 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Outstanding Interest**—The date the outstanding interest balance was updated. (This is field code 137 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Amount**
 - **Loan**—The original loan amount before any cancellations. (This is field code 61 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
 - **Outstanding Principal Balance**—The cumulative dollar value due on a loan. (This is field code 136 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
 - **Outstanding Interest**—The cumulative accrued outstanding interest balance on the loan. (This is field code 138 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
 - **Other Fees**—The accumulated fees added to late or defaulted loans. Examples of other fees are late fees, collection costs, or court costs. (This is field code 108 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)



Update Loan Amounts



Please type over fields to make changes.

	Date (MMDDCCYY)	Amount
Loan:	01/01/1988	12,000
Outstanding Principal Balance:	01/01/1990	10,000
Outstanding Interest:	01/01/1990	1,000
Other Fees:		0

Figure 5–12, Update Loan Amounts Pop-Up

5.5.5 Add Disbursement

The Add Disbursement pop-up window (Figure 5–13) allows you to add the Disbursement information.

How to add the Disbursement information

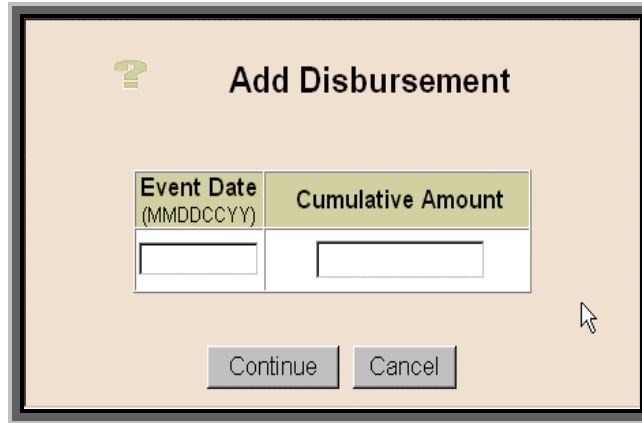
To add the Disbursement information:

1. In the **Event Date (MMDDCCYY)** box, type a date.
2. In the **Cumulative Amount** box, type an amount (do not use a \$ or a decimal).
3. Click **Continue** to return to the Loan Detail Update page, which displays the new information. To submit the new information to NSLDS, refer to the Loan Detail Update Help page.
4. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Add Disbursement information

The Add Disbursement information is defined as follows:

- **Event Date (MMDDCCYY)**—The date when the latest loan disbursement was made. (This is field code 66 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Cumulative Amount**—The cumulative net amount of loan actually disbursed to a borrower. (This is field code 67 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)



The image shows a 'Add Disbursement' pop-up dialog box. It has a light beige background and a dark border. In the top left corner, there is a small green question mark icon. The title 'Add Disbursement' is centered at the top in a bold, black font. Below the title, there are two input fields side-by-side. The first field is labeled 'Event Date' with '(MMDDCCYY)' underneath it. The second field is labeled 'Cumulative Amount'. Both fields are empty. At the bottom of the dialog, there are two buttons: 'Continue' and 'Cancel'. A mouse cursor is visible on the right side of the dialog box.

Event Date (MMDDCCYY)	Cumulative Amount

Continue Cancel

Figure 5–13, Add Disbursement Pop-Up

5.5.6 Update Disbursements

The Update Disbursements pop-up window (Figure 5–14) allows you to revise or delete the Disbursements information.

How to revise the Disbursements information

To revise the Disbursements information, you may type over the information that already displays in the text boxes:

1. In the **Event Date (MMDDCCYY)** box, type a date.
2. In the **Cumulative Amount** box, type an amount (do not use a \$ or a decimal).
3. Click **Continue** to return to the Loan Detail Update page, which displays the revision you want. To submit the revision to NSLDS, refer to the Loan Detail Update Help page.
4. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to delete the Disbursements information

To delete the Disbursements information:

1. Click the check box in the **Delete** column (to the left of the row to be deleted).
2. Click **Continue** to return to the Loan Detail Update page, which displays the deletion you want. To submit the deletion to NSLDS, refer to the Loan Detail Update Help page.
3. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Update Disbursements information

The Update Disbursements information is defined as follows:

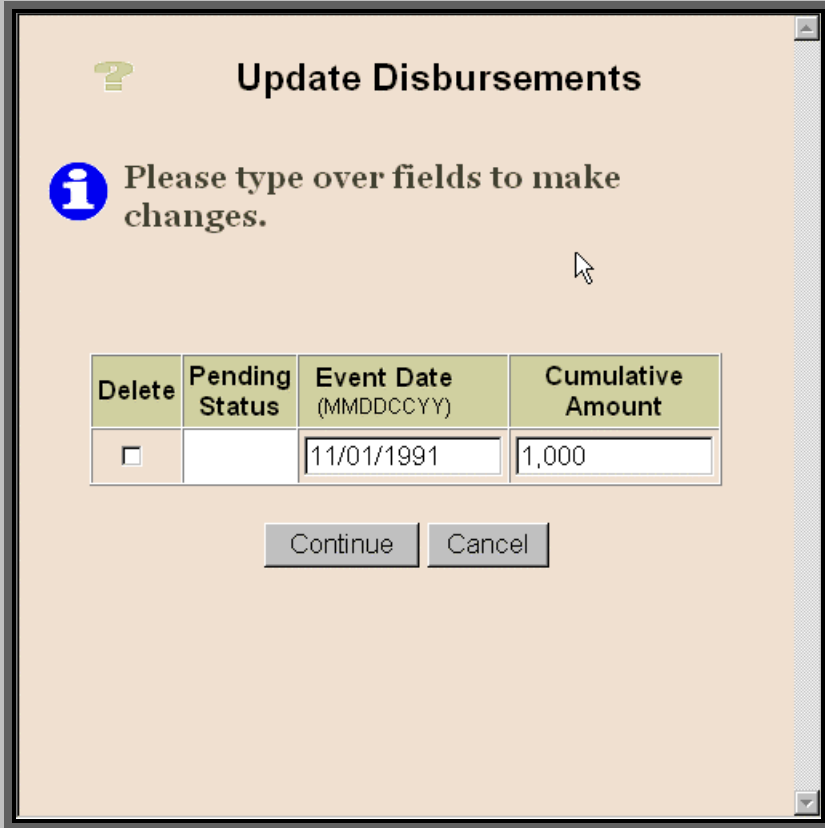
- **Delete**—Indicates the information should be deleted from NSLDS. The deletion takes effect when the information is submitted to NSLDS from the Loan Detail Update page.
- **Pending Status**—The addition, revision, or deletion that takes effect when the information is submitted to NSLDS from the Loan Detail Update page:

New—The status icon that displays when information is added.

Revised—The status icon that displays when information is revised.

Delete—The status icon that displays when information is deleted.

- **Event Date (MMDDCCYY)**—The date when the latest loan disbursement was made. (This is field code 66 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Amount**—The net amount of loan actually disbursed to a borrower. (This is field code 67 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)



Delete	Pending Status	Event Date (MMDDCCYY)	Cumulative Amount
<input type="checkbox"/>		11/01/1991	1,000

Continue Cancel

Figure 5–14, Update Disbursements Pop-Up

5.5.7 Add Cancellation

The Add Cancellation pop-up window (Figure 5–15) allows you to add the Cancellation information.

How to add the Cancellation information

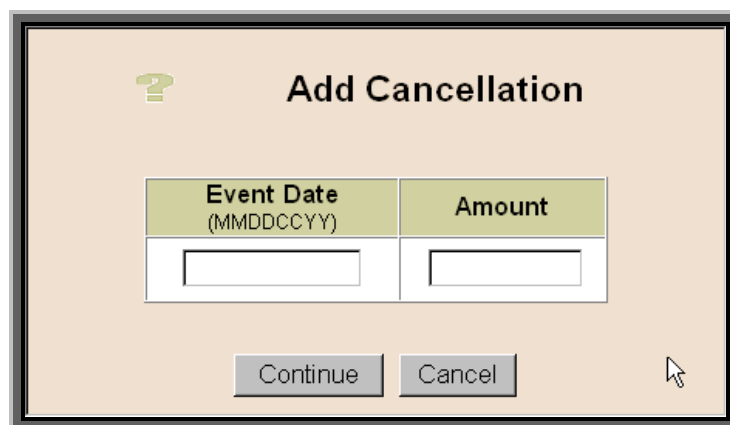
To add the Cancellation information:

1. In the **Event Date (MMDDCCYY)** box, type a date.
2. In the **Amount** box, type an amount (do not use a \$ or a decimal).
3. Click **Continue** to return to the Loan Detail Update page, which displays the new information. To submit the new information to NSLDS, refer to the Loan Detail Update Help page.
4. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Add Cancellation information

The Add Cancellation information is defined as follows:

- **Event Date (MMDDCCYY)**—The date when all or part of a loan was canceled. (This is field code 64 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Amount**—The amount of loan or disbursement(s) that was canceled. (This is field code 65 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)



Event Date (MMDDCCYY)	Amount
<input type="text"/>	<input type="text"/>

Figure 5–15, Add Cancellation Pop-Up

5.5.8 Update Cancellation

The Update Cancellation pop-up window (Figure 5–16) allows you to revise or delete the Cancellation information.

How to revise the Cancellation information

To revise the Cancellation information, you may type over the information that already displays in the text boxes:

1. In the **Event Date (MMDDCCYY)** box, type a date.
2. In the **Cumulative Amount** box, type an amount (do not use a \$ or a decimal).
3. Click **Continue** to return to the Loan Detail Update page, which displays the revision you want. To submit the revision to NSLDS, refer to the Loan Detail Update Help page.
4. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to delete the Cancellation information

To delete the Cancellation information:

1. Click the check box in the **Delete** column (to the left of the row to be deleted).
2. Click **Continue** to return to the Loan Detail Update page, which displays the deletion you want. To submit the deletion to NSLDS, refer to the Loan Detail Update Help page.
3. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Update Cancellation information

The Update Cancellation information is defined as follows:

- **Delete**—Indicates the information should be deleted from NSLDS. The deletion takes effect when the information is submitted to NSLDS from the Loan Detail Update page.
- **Pending Status**—The addition, revision, or deletion that takes effect when the information is submitted to NSLDS from the Loan Detail Update page:

New—The status icon that displays when information is added.

Revised—The status icon that displays when information is revised.

Delete—The status icon that displays when information is deleted.

- **Event Date (MMDDCCYY)**—The date when all or part of a loan was canceled. (This is field code 64 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Cumulative Amount**—The cumulative amount of loan or disbursement(s) that was canceled. (This is field code 65 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)

Update Cancellation

i Please type over fields to make changes.

Delete	Pending Status	Event Date (MMDDCCYY)	Cumulative Amount
<input type="checkbox"/>		01/01/1990	1,000

Continue Cancel

Figure 5–16, Update Cancellation Pop-Up

5.5.9 Add Refund

The Add Refund pop-up window (Figure 5–17) allows you to add the Refund information.

How to add the Refund information

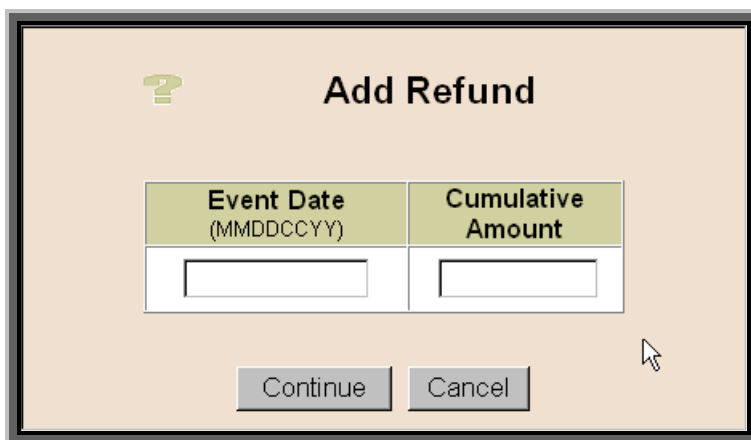
To add the Refund information:

1. In the **Event Date (MMDDCCYY)** box, type a date.
2. In the **Cumulative Amount** box, type an amount (do not use a \$ or a decimal).
3. Click **Continue** to return to the Loan Detail Update page, which displays the new information. To submit the new information to NSLDS, refer to the Loan Detail Update Help page.
4. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Add Refund information

The Add Refund information is defined as follows:

- **Event Date (MMDDCCYY)**—The date when a lender receives a refund from the school. (This is field code 101 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Cumulative Amount**—The cumulative amount of refund(s) returned from school to lender, as reported by lender. School refunds should be reported in this field up to the time an insurance claim is paid on a loan. (This is field code 103 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)



The image shows a web-based pop-up dialog box titled "Add Refund". In the top-left corner, there is a green question mark icon. The title "Add Refund" is centered at the top in a bold black font. Below the title, there are two input fields side-by-side. The left field is labeled "Event Date (MMDDCCYY)" and the right field is labeled "Cumulative Amount". Both labels are in bold black text. Below each label is a white rectangular input box. At the bottom of the dialog, there are two buttons: "Continue" on the left and "Cancel" on the right. A mouse cursor is visible on the right side of the dialog, pointing towards the "Cancel" button.

Event Date (MMDDCCYY)	Cumulative Amount
<input type="text"/>	<input type="text"/>

Figure 5–17, Add Refund Pop-Up

5.5.10 Update Refunds

The Update Refunds pop-up window (Figure 5–18) allows you to revise or delete the Refunds information.

How to revise the Refunds information

To revise the Refunds information, you may type over the information that already displays in the text boxes:

1. In the **Event Date (MMDDCCYY)** box, type a date.
2. In the **Cumulative Amount** box, type an amount (do not use a \$ or a decimal).
3. Click **Continue** to return to the Loan Detail Update page, which displays the revision you want. To submit the revision to NSLDS, refer to the Loan Detail Update Help page.
4. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to delete the Refunds information

To delete the Refunds information:

1. Click the check box in the **Delete** column (to the left of the row to be deleted).
2. Click **Continue** to return to the Loan Detail Update page, which displays the deletion you want. To submit the deletion to NSLDS, refer to the Loan Detail Update Help page.
3. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Add Refunds information

The Add Refunds information is defined as follows:

- **Delete**—Indicates the information should be deleted from NSLDS. The deletion takes effect when the information is submitted to NSLDS from the Loan Detail Update page.
- **Pending Status**—The addition, revision, or deletion that takes effect when the information is submitted to NSLDS from the Loan Detail Update page:

New—The status icon that displays when information is added.

Revised—The status icon that displays when information is revised.

Delete—The status icon that displays when information is deleted.

- **Event Date (MMDDCCYY)**—The date when a lender receives a refund from the school. (This is field code 101 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Cumulative Amount**—The cumulative amount of refund(s) returned from school to lender, as reported by lender. School refunds should be reported in this field up to the time an insurance claim is paid on a loan. (This is field code 103 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)

Delete	Pending Status	Event Date (MMDDCCYY)	Cumulative Amount
<input type="checkbox"/>		12/25/2001	700

Continue Cancel

Figure 5–18, Update Refunds Pop-Up

5.5.11 Add Deferment

The Add Deferment pop-up window (Figure 5–19) allows you to add the Deferment information.

How to add the Deferment information

To add the Deferment information:

1. In the **Start Date (MMDDCCYY)** box, type a date.
2. In the **End Date (MMDDCCYY)** box, type a date.
3. In the **Type** box, click a selection from the list.
4. Click **Continue** to return to the Loan Detail Update page, which displays the new information. To submit the new information to NSLDS, refer to the Loan Detail Update Help page.
5. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Add Deferment information

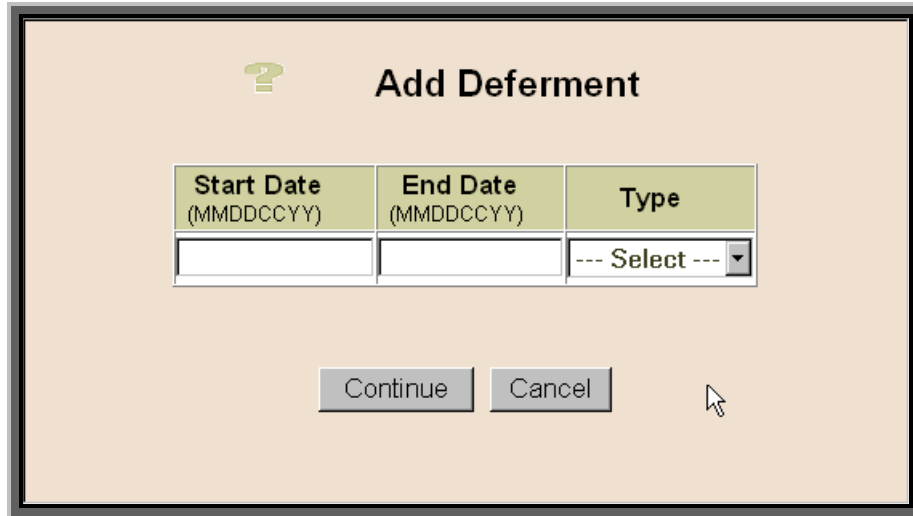
The Add Deferment information is defined as follows:

- **Start Date (MMDDCCYY)**—The date when a legal deferment actually begins. (This is field code 92 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **End Date (MMDDCCYY)**—The date when a legal deferment is projected to end or actually ends. Includes post-deferment grace period if applicable. (This is field code 93 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Type**—One of the legal reasons for postponing repayment of loan principal and interest. (This is field code 91 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)

The codes for the deferment types are defined as follows:

Deferment Type	Description
AC	Action Programs
AP	Armed Forces or PHS

Deferment Type	Description
EH	Economic Hardship
EP	Full-Time Family Service to High Risk
FM	Full-Time Teacher of Math
FN	Full-Time Nurse/Medical Tech
FP	Full-Time Provider
FS	Full-Time Special Ed Teacher
FT	Full-Time Student
GF	Graduate Fellowship Program
HD	Head Start
HS	Hardship
HT	Half-Time Student
IR	Internship/Residency
LE	Law Enforcement
LF	Deferred Pending Loan Forgiveness Cancellation
NO	National Oceanic and Atmospheric Administration Corps
PC	Peace Corps
PL	Parental Leave
PP	Parental PLUS Borrower
RT	Rehabilitation Training
TD	Temporary Disability
TE	Tax-Exempt Organizations
TL	Teacher Low-Income Institution
TS	Teacher Shortage
UE	Unemployment Less Than 3 Years
UN	Unemployment Less Than 2 Years
WM	Working Mother



The image shows a 'Add Deferment' pop-up dialog box. It has a title bar with a question mark icon and the text 'Add Deferment'. Inside the dialog, there is a table with three columns: 'Start Date (MMDDCCYY)', 'End Date (MMDDCCYY)', and 'Type'. The 'Start Date' and 'End Date' columns have empty text input fields. The 'Type' column has a dropdown menu with the text '--- Select ---'. Below the table, there are two buttons: 'Continue' and 'Cancel'. A mouse cursor is pointing at the 'Cancel' button.

Start Date (MMDDCCYY)	End Date (MMDDCCYY)	Type
		--- Select ---

Figure 5–19, Add Deferment Pop-Up

5.5.12 Update Deferments

The Update Deferments pop-up window (Figure 5–20) allows you to revise or delete the Deferments information.

How to revise the Deferments information

To revise the Deferments information, you may type over or re-select the information that already displays in the text boxes:

1. In the **Start Date (MMDDCCYY)** box, type a date.
2. In the **End Date (MMDDCCYY)** box, type a date.
3. In the **Type** box, click a selection from the list.
4. Click **Continue** to return to the Loan Detail Update page, which displays the revision you want. To submit the revision to NSLDS, refer to the Loan Detail Update Help page.
5. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to delete the Deferments information

To delete the Deferments information:

1. Click the check box in the **Delete** column (to the left of the row to be deleted).
2. Click **Continue** to return to the Loan Detail Update page, which displays the deletion you want. To submit the deletion to NSLDS, refer to the Loan Detail Update Help page.
3. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Update Deferments information

The Update Deferments information is defined as follows:

- **Delete**—Indicates the information should be deleted from NSLDS. The deletion takes effect when the information is submitted to NSLDS from the Loan Detail Update page.
- **Pending Status**—The addition, revision, or deletion that takes effect when the information is submitted to NSLDS from the Loan Detail Update page:

New—The status icon that displays when information is added.

Revised—The status icon that displays when information is revised.

Delete—The status icon that displays when information is deleted.

- **Start Date (MMDDCCYY)**—The date when a legal deferment actually begins. (This is field code 92 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **End Date (MMDDCCYY)**—The date when a legal deferment is projected to end or actually ends. Includes post-deferment grace period if applicable. (This is field code 93 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Type**—One of the legal reasons for postponing repayment of loan principal and interest. (This is field code 91 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)

The codes for the deferment types are defined as follows:

Deferment Type	Description
AC	Action Programs
AP	Armed Forces or PHS
EH	Economic Hardship
EP	Full-Time Family Service to High Risk
FM	Full-Time Teacher of Math
FN	Full-Time Nurse/Medical Tech
FP	Full-Time Provider
FS	Full-Time Special Ed Teacher
FT	Full-Time Student
GF	Graduate Fellowship Program
HD	Head Start
HS	Hardship
HT	Half-Time Student
IR	Internship/Residency
LE	Law Enforcement
LF	Deferred Pending Loan Forgiveness Cancellation
NO	National Oceanic and Atmospheric Administration Corps
PC	Peace Corps

Deferment Type	Description
PL	Parental Leave
PP	Parental PLUS Borrower
RT	Rehabilitation Training
TD	Temporary Disability
TE	Tax-Exempt Organizations
TL	Teacher Low-Income Institution
TS	Teacher Shortage
UE	Unemployment Less Than 3 Years
UN	Unemployment Less Than 2 Years
WM	Working Mother

Update Deferments

i Please type over fields to make changes.

Delete	Pending Status	Start Date (MMDDCCYY)	End Date (MMDDCCYY)	Type
<input type="checkbox"/>		01/01/1990	02/01/1990	FT

Continue Cancel

Figure 5–20, Update Deferments Pop-Up

5.5.13 Add Loan Status

The Add Loan Status pop-up window (Figure 5–21) allows you to add the Loan Status information.

How to add the Loan Status information

To add the Loan Status information:

1. In the **Status Date (MMDDCCYY)** box, type a date.
2. In the **Status** box, click a selection from the list.
3. Click **Continue** to return to the Loan Detail Update page, which displays the new information. To submit the new information to NSLDS, refer to the Loan Detail Update Help page.
4. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Add Loan Status information

The Add Loan Status information is defined as follows:

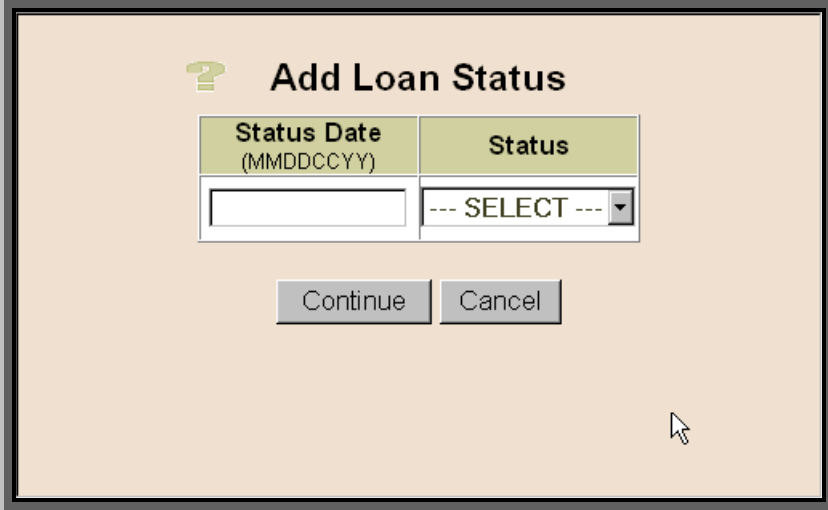
- **Status Date (MMDDCCYY)**—The date a loan status first became effective, with no interruptions. (This is field code 62 as described in Appendix A of the Guaranty Agency Data Provider Instructions.) This date is not necessarily the date the status was reported to NSLDS. A loan status may have changed but not been updated in NSLDS for various reasons until months or years after the fact.
- **Status**—The two-character code and description indicating the status of a loan. (This is field code 63 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)

The loan status codes are defined as follows:

Loan Status Code	Definition
AL	Abandoned Loan
BC	Bankruptcy Claim, Discharged
BK	Bankruptcy Claim, Active
CA	Canceled
CS	Closed School Discharge

Loan Status Code	Definition
DA	Deferred
DB	Defaulted, Then Bankrupt, Active, Chapter 13
DC	Defaulted, Compromise
DD	Defaulted, Then Died
DE	Death
DF	Defaulted, Unresolved
DI	Disability
DK	Defaulted, Then Bankrupt, Discharged, Chapter 13
DL	Defaulted, In Litigation
DN	Defaulted, Paid in Full Through Consolidation Loan
DO	Defaulted, Then Bankrupt, Active, Other
DP	Defaulted, Paid in Full
DR	Defaulted Loan Included in Roll-Up Loan
DS	Defaulted, Then Disabled
DT	Defaulted, Collection Terminated
DU	Defaulted, Unresolved
DW	Defaulted, Write-off
DX	Defaulted, Six Consecutive Payments
DZ	Defaulted, Six Consecutive Payments, Then Missed Payment
FB	Forbearance
FC	False Certification Discharge
IA	Loan Originated
ID	In School or Grace Period
IG	In Grace Period
IM	In Military Grace
IP	In Post-Deferment Grace (Perkins Only)
OD	Defaulted, Then Bankrupt, Discharged, Other
PC	Paid in Full Through Consolidation Loan
PF	Paid in Full
PM	Presumed Paid in Full
PN	Non-defaulted, Paid in Full Through Consolidation Loan
RF	Refinanced
RP	In Repayment

Loan Status Code	Definition
UA	Temporarily Uninsured - No Default Claim Requested
UB	Temporarily Uninsured - Default Claim Denied
UC	Permanently Uninsured - No Default Claim Requested
UD	Permanently Uninsured - Default Claim Denied
UI	Uninsured/Unreinsured
XD	Defaulted, Six Consecutive Payments



The image shows a pop-up dialog box titled "Add Loan Status" with a question mark icon. It contains two input fields: "Status Date (MMDDCCYY)" and "Status". The "Status" field is a dropdown menu currently showing "--- SELECT ---". Below these fields are two buttons: "Continue" and "Cancel". A mouse cursor is visible near the bottom right of the dialog box.

Figure 5–21, Add Loan Status Pop-Up

5.5.14 Update Status

The Update Status pop-up window (Figure 5–22) allows you to revise or delete the Status information.

How to revise the Status information

To revise the Status information, you may type over or re-select the information that already displays in the text boxes:

1. In the **Status Date (MMDDCCYY)** box, type a date.
2. In the **Status** box, click a selection from the list.
3. Click **Continue** to return to the Loan Detail Update page, which displays the revision you want. To submit the revision to NSLDS, refer to the Loan Detail Update Help page.
4. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to delete the Status information

To delete the Status information:

1. Click the check box in the **Delete** column (to the left of the row to be deleted).
2. Click **Continue** to return to the Loan Detail Update page, which displays the deletion you want. To submit the deletion to NSLDS, refer to the Loan Detail Update Help page.
3. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Update Status information

The Update Status information is defined as follows:

- **Delete**—Indicates the information should be deleted from NSLDS. The deletion takes effect when the information is submitted to NSLDS from the Loan Detail Update page.
- **Pending Status**—The addition, revision, or deletion that takes effect when the information is submitted to NSLDS from the Loan Detail Update page:

New—The status icon that displays when information is added.

Revised—The status icon that displays when information is revised.

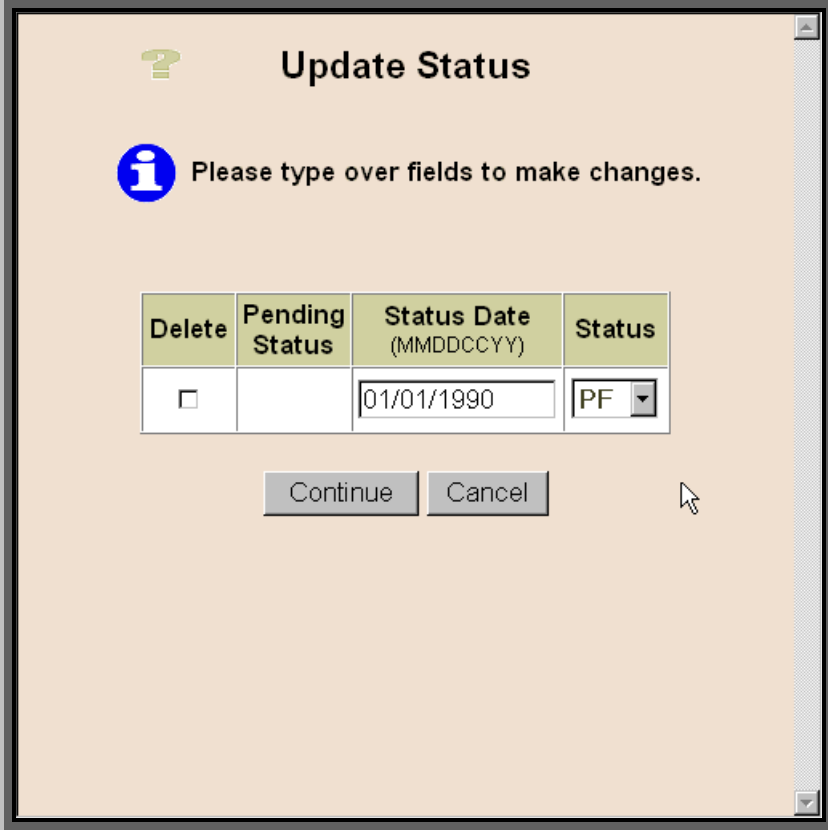
Delete—The status icon that displays when information is deleted.

- **Status Date (MMDDCCYY)**—The date a loan status first became effective, with no interruptions. (This is field code 62 as described in Appendix A of the Guaranty Agency Data Provider Instructions.) This date is not necessarily the date the status was reported to NSLDS. A loan status may have changed but not been updated in NSLDS for various reasons until months or years after the fact.
- **Status**—The two-character code and description indicating the status of a loan. (This is field code 63 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)

The loan status codes are defined as follows:

Loan Status Code	Definition
AL	Abandoned Loan
BC	Bankruptcy Claim, Discharged
BK	Bankruptcy Claim, Active
CA	Canceled
CS	Closed School Discharge
DA	Deferred
DB	Defaulted, Then Bankrupt, Active, Chapter 13
DC	Defaulted, Compromise
DD	Defaulted, Then Died
DE	Death
DF	Defaulted, Unresolved
DI	Disability
DK	Defaulted, Then Bankrupt, Discharged, Chapter 13
DL	Defaulted, In Litigation
DN	Defaulted, Paid in Full Through Consolidation Loan
DO	Defaulted, Then Bankrupt, Active, Other
DP	Defaulted, Paid in Full
DR	Defaulted Loan Included in Roll-Up Loan
DS	Defaulted, Then Disabled
DT	Defaulted, Collection Terminated
DU	Defaulted, Unresolved

Loan Status Code	Definition
DW	Defaulted, Write-off
DX	Defaulted, Six Consecutive Payments
DZ	Defaulted, Six Consecutive Payments, Then Missed Payment
FB	Forbearance
FC	False Certification Discharge
IA	Loan Originated
ID	In School or Grace Period
IG	In Grace Period
IM	In Military Grace
IP	In Post-Deferment Grace (Perkins Only)
OD	Defaulted, Then Bankrupt, Discharged, Other
PC	Paid in Full Through Consolidation Loan
PF	Paid in Full
PM	Presumed Paid in Full
PN	Non-defaulted, Paid in Full Through Consolidation Loan
RF	Refinanced
RP	In Repayment
UA	Temporarily Uninsured - No Default Claim Requested
UB	Temporarily Uninsured - Default Claim Denied
UC	Permanently Uninsured - No Default Claim Requested
UD	Permanently Uninsured - Default Claim Denied
UI	Uninsured/Unreinsured
XD	Defaulted, Six Consecutive Payments



The image shows a 'Update Status' pop-up window. At the top left is a green question mark icon. The title 'Update Status' is centered at the top. Below the title is a blue information icon followed by the text 'Please type over fields to make changes.' In the center is a table with four columns: 'Delete', 'Pending Status', 'Status Date (MMDDCCYY)', and 'Status'. The 'Delete' column contains a checkbox. The 'Status Date' column contains the text '01/01/1990'. The 'Status' column contains a dropdown menu with 'PF' selected. Below the table are two buttons: 'Continue' and 'Cancel'. A mouse cursor is pointing at the 'Cancel' button.

Delete	Pending Status	Status Date (MMDDCCYY)	Status
<input type="checkbox"/>		01/01/1990	PF

Continue Cancel

Figure 5–22, Update Status Pop-Up

5.5.15 Add Insurance Claim Payment

The Add Insurance Claim Payment pop-up window (Figure 5–23) allows you to add the Insurance Claim Payment information.

How to add the Insurance Claim Payment information

To add the Insurance Claim Payment information:

1. In the **Date (MMDDCCYY)** box, type a date.
2. In the **Cumulative Amount** box, type an amount (do not use a \$ or a decimal).
3. In the **Reason Code** box, click a selection from the list.
4. Click **Continue** to return to the Loan Detail Update page, which displays the new information. To submit the new information to NSLDS, refer to the Loan Detail Update Help page.
5. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

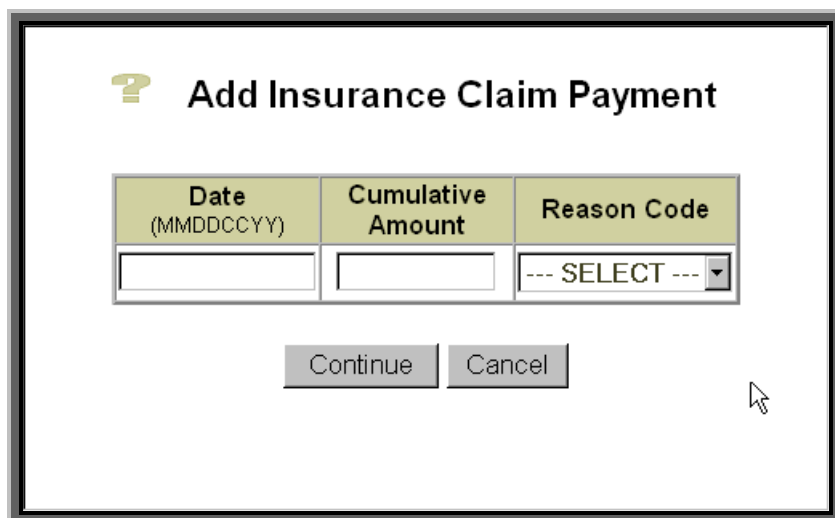
How to interpret the Add Insurance Claim Payment information

The Add Insurance Claim Payment information is defined as follows:

- **Date (MMDDCCYY)**—The date when a Guaranty Agency paid an insurance claim or supplemental claim to a lender. (This is field code 106 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Cumulative Amount**—The cumulative amount of principal and interest including supplemental claims paid to a lender by a Guaranty Agency for an insurance claim on an FFELP loan. Amount does not include claims that were made prior to repurchase. (This is field code 107 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Reason Code**—The code indicating the reason the latest insurance claim, including supplemental claims, was paid to a lender. (This is field code 105 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)

The reason codes include the following:

Reason Code	Description
IX	Direct Loan Default
IN	Income Contingent Negative Amortization
FC	False Certification
EX	Exempt
BO	Bankruptcy, Other
BC	Bankruptcy, Chapter 13
DI	Disability
DF	Default
DE	Death
CS	Closed School



The image shows a software dialog box titled "Add Insurance Claim Payment" with a question mark icon. It contains three input fields: "Date (MMDDCCYY)", "Cumulative Amount", and "Reason Code". The "Reason Code" field is a dropdown menu currently showing "--- SELECT ---". Below the fields are "Continue" and "Cancel" buttons. A mouse cursor is visible near the bottom right of the dialog box.

Figure 5–23, Add Insurance Claim Payment Pop-Up

5.5.16 Update Insurance Claim Payment

The Update Insurance Claim Payment pop-up window (Figure 5–24) allows you to revise or delete the Insurance Claim Payment information.

How to revise the Insurance Claim Payment information

To revise the Insurance Claim Payment information, you may type over or re-select the information that already displays in the text boxes:

1. In the **Date (MMDDCCYY)** box, type a date.
2. In the **Cumulative Amount** box, type an amount (do not use a \$ or a decimal).
3. In the **Reason Code** box, click a selection.
4. Click **Continue** to return to the Loan Detail Update page, which displays the revision you want. To submit the revision to NSLDS, refer to the Loan Detail Update Help page.
5. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to delete the Insurance Claim Payment information

To delete the Insurance Claim Payment information:

1. Click the check box in the **Delete** column (to the left of the row to be deleted).
2. Click **Continue** to return to the Loan Detail Update page, which displays the deletion you want. To submit the deletion to NSLDS, refer to the Loan Detail Update Help page.
3. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Update Insurance Claim Payment information

The Update Insurance Claim Payment information is defined as follows:

- **Delete**—Indicates the information should be deleted from NSLDS. The deletion takes effect when the information is submitted to NSLDS from the Loan Detail Update page.
- **Pending Status**—The addition, revision, or deletion that takes effect when the information is submitted to NSLDS from the Loan Detail Update page:

New—The status icon that displays when information is added.

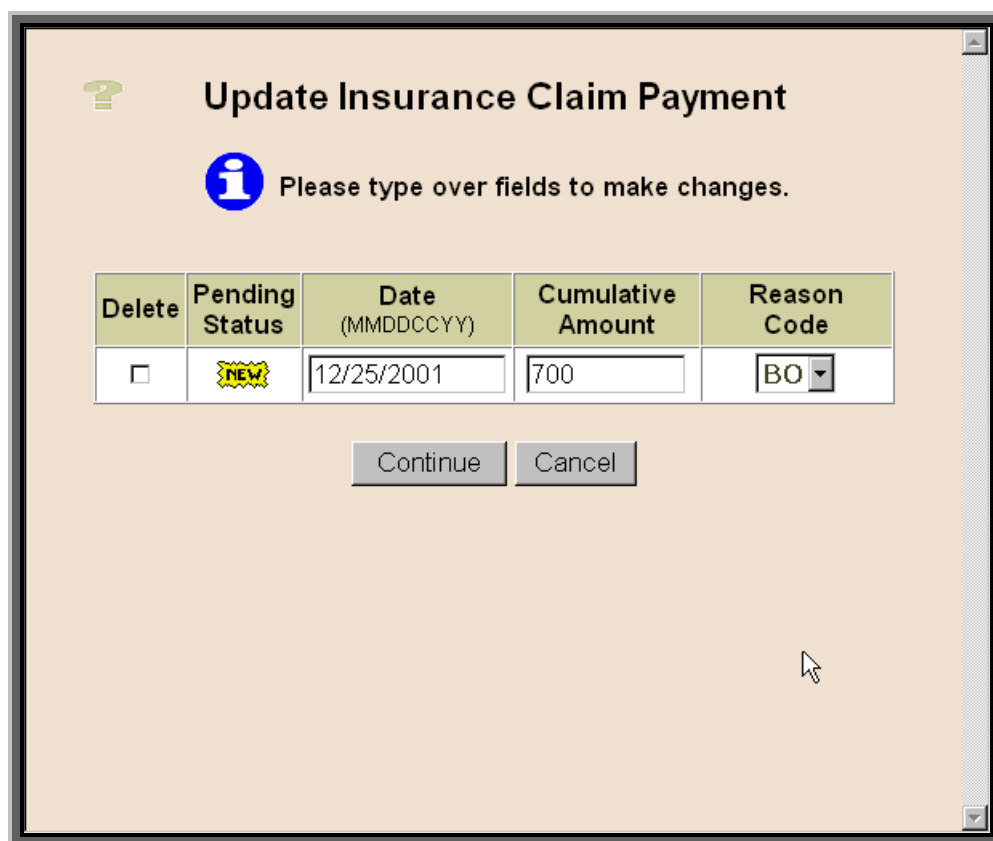
Revised—The status icon that displays when information is revised.

Delete—The status icon that displays when information is deleted.

- **Date (MMDDCCYY)**—The date when a Guaranty Agency paid an insurance claim or supplemental claim to a lender. (This is field code 106 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Cumulative Amount**—The cumulative amount of principal and interest including supplemental claims paid to a lender by a Guaranty Agency for an insurance claim on an FFELP loan. Amount does not include claims that were made prior to repurchase. (This is field code 107 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Reason Code**—The code indicating the reason the latest insurance claim, including supplemental claims, was paid to a lender. (This is field code 105 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)

The reason codes include the following:

Reason Code	Description
IX	Direct Loan Default
IN	Income Contingent Negative Amortization
FC	False Certification
EX	Exempt
BO	Bankruptcy, Other
BC	Bankruptcy, Chapter 13
DI	Disability
DF	Default
DE	Death
CS	Closed School



A screenshot of a web application pop-up window titled "Update Insurance Claim Payment". The window has a light beige background and a dark border. At the top left is a green question mark icon. Below the title is a blue information icon followed by the text "Please type over fields to make changes." Below this is a table with five columns: "Delete", "Pending Status", "Date (MMDDCCYY)", "Cumulative Amount", and "Reason Code". The "Delete" column contains a checkbox. The "Pending Status" column contains a yellow "NEW" label. The "Date" column contains the text "12/25/2001". The "Cumulative Amount" column contains the text "700". The "Reason Code" column contains a dropdown menu with "BO" selected. Below the table are two buttons: "Continue" and "Cancel". A mouse cursor is visible in the bottom right area of the pop-up.

Delete	Pending Status	Date (MMDDCCYY)	Cumulative Amount	Reason Code
<input type="checkbox"/>	NEW	12/25/2001	700	BO

Continue Cancel

Figure 5–24, Update Insurance Claim Payment Pop-Up

5.5.17 Add Insurance Claim Refund

The Add Insurance Claim Refund pop-up window (Figure 5–25) allows you to add the Insurance Claim Refund information.

How to add the Insurance Claim Refund information

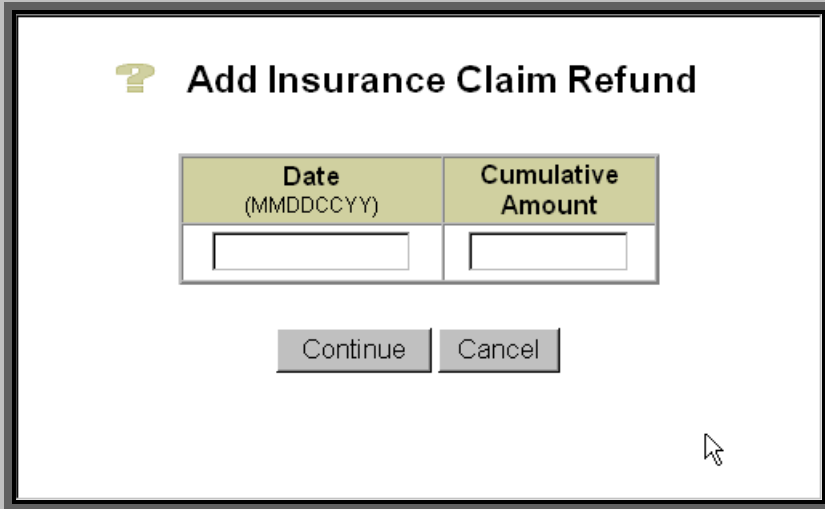
To add the Insurance Claim Refund information:

1. In the **Date (MMDDCCYY)** box, type a date.
2. In the **Cumulative Amount** box, type an amount (do not use a \$ or a decimal).
3. Click **Continue** to return to the Loan Detail Update page, which displays the new information. To submit the new information to NSLDS, refer to the Loan Detail Update Help page.
4. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Add Insurance Claim Refund information

The Add Insurance Claim Refund information is defined as follows:

- **Date (MMDDCCYY)**—The date when a Guaranty Agency received an insurance claim refund from a lender. (This is field code 99 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Cumulative Amount**—The cumulative dollar amount of refund(s) from a lender to a Guaranty Agency. Refunds may occur because of an overpayment of a claim, late refunds from the institution to the lender, or borrower payments to the lender after default and prior to the request for reinsurance. If reinsurance has been requested from ED, report the amount as a collection. Amount does not include refunds that were made prior to repurchase. (This is field code 100 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)



A screenshot of a web application pop-up window titled "Add Insurance Claim Refund". The window has a light gray border and a white background. At the top left is a yellow question mark icon. The title "Add Insurance Claim Refund" is in bold black text. Below the title is a table with two columns: "Date (MMDDCCYY)" and "Cumulative Amount". Each column has a text input field below it. At the bottom of the window are two buttons: "Continue" and "Cancel". A mouse cursor is visible in the bottom right corner of the window.

Date (MMDDCCYY)	Cumulative Amount
<input type="text"/>	<input type="text"/>

Figure 5–25, Add Insurance Claim Refund Pop-Up

5.5.18 Update Insurance Claim Refund

The Update Insurance Claim Refund pop-up window (Figure 5–26) allows you to revise or delete the Insurance Claim Refund information.

How to revise the Insurance Claim Refund information

To revise the Insurance Claim Refund information, you may type over the information that already displays in the text boxes:

1. In the **Date (MMDDCCYY)** box, type a date.
2. In the **Cumulative Amount** box, type an amount (do not use a \$ or a decimal).
3. Click **Continue** to return to the Loan Detail Update page, which displays the revision you want. To submit the revision to NSLDS, refer to the Loan Detail Update Help page.
4. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to delete the Insurance Claim Refund information

To delete the Insurance Claim Refund information:

1. Click the check box in the **Delete** column (to the left of the row to be deleted).
2. Click **Continue** to return to the Loan Detail Update page, which displays the deletion you want. To submit the deletion to NSLDS, refer to the Loan Detail Update Help page.
3. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Update Insurance Claim Refund information

The Update Insurance Claim Refund information is defined as follows:

- **Delete**—Indicates the information should be deleted from NSLDS. The deletion takes effect when the information is submitted to NSLDS from the Loan Detail Update page.
- **Pending Status**—The addition, revision, or deletion that takes effect when the information is submitted to NSLDS from the Loan Detail Update page:

New—The status icon that displays when information is added.

Revised—The status icon that displays when information is revised.

Delete—The status icon that displays when information is deleted.

- **Date (MMDDCCYY)**—The date when a Guaranty Agency received an insurance claim refund from a lender. (This is field code 99 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Cumulative Amount**—The cumulative dollar amount of refund(s) from a lender to a Guaranty Agency. Refunds may occur because of an overpayment of a claim, late refunds from the institution to the lender, or borrower payments to the lender after default and prior to the request for reinsurance. If reinsurance has been requested from ED, report the amount as a collection. Amount does not include refunds that were made prior to repurchase. (This is field code 100 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)

Delete	Pending Status	Date (MMDDCCYY)	Cumulative Amount
<input type="checkbox"/>	NEW	12/30/2001	1,580

Continue Cancel

Figure 5–26, Update Insurance Claim Refund Pop-Up

5.5.19 Add Reinsurance Claim Payment

The Add Reinsurance Claim Payment pop-up window (Figure 5–27) allows you to add the Reinsurance Claim Payment information.

How to add the Reinsurance Claim Payment information

To add the Reinsurance Claim Payment information:

1. In the **Date Requested (MMDDCCYY)** box, type a date.
2. In the **Cumulative Amount** box, type an amount (do not use a \$ or a decimal).
3. In the **Reason Code** box, click a selection from the list.
4. In the **Date Paid (MMDDCCYY)** box, type a date.
5. In the **Rate Code** box, click a selection from the list.
6. Click **Continue** to return to the Loan Detail Update page, which displays the new information. To submit the new information to NSLDS, refer to the Loan Detail Update Help page.
7. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Add Reinsurance Claim Payment information

The Add Reinsurance Claim Payment information is defined as follows:

- **Date Requested (MMDDCCYY)**—The date when a Guaranty Agency requested reinsurance. (This is field code 114 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Cumulative Amount**—The dollar amount of a reinsurance claim requested of ED by a Guaranty Agency. Amount does not include claims that were made prior to repurchase. (This is field code 116 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Reason Code**—The code indicating the reason the latest reinsurance claim, including supplemental insurance, was paid to a Guaranty Agency. (This is field code 96 as described in Appendix A of the Guaranty Agency Data Provider Instructions.) The reason codes include the following:

Reason Code	Description
IX	Direct Loan Default
IN	Income Contingent Negative Amortization
FC	False Certification
EX	Exempt
BO	Bankruptcy, Other
BC	Bankruptcy, Chapter 13
DI	Disability
DF	Default
DE	Death
CS	Closed School

- **Date Paid (MMDDCCYY)**—The date when a Guaranty Agency receives the government reinsurance claim payment. (This is field code 115 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Rate Code**—The code indicating the rate at which the government paid a claim to a Guaranty Agency on a specific loan. (This is field code 119 as described in Appendix A of the Guaranty Agency Data Provider Instructions.) The rate codes include the following: Code 1 (100%); Code 2 (90%); Code 3 (80%); and Code 0 (0%).

Figure 5–27, Add Reinsurance Claim Payment Pop-Up

5.5.20 Update Reinsurance Claim Payment

The Update Reinsurance Claim Payment pop-up window (Figure 5–28) allows you to revise or delete the Reinsurance Claim Payment information.

How to revise the Reinsurance Claim Payment information

To revise the Reinsurance Claim Payment information, you may type over or re-select the information that already displays in the text boxes:

1. In the **Date Requested (MMDDCCYY)** box, type a date.
2. In the **Cumulative Amount** box, type an amount (do not use a \$ or a decimal).
3. In the **Reason Code** box, click a selection.
4. In the **Date Paid (MMDDCCYY)** box, type a date.
5. In the **Rate Code** box, click a selection.
6. Click **Continue** to return to the Loan Detail Update page, which displays the revision you want. To submit the revision to NSLDS, refer to the Loan Detail Update Help page.
7. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to delete the Reinsurance Claim Payment information

To delete the Reinsurance Claim Payment information:

1. Click the check box in the **Delete** column (to the left of the row to be deleted).
2. Click **Continue** to return to the Loan Detail Update page, which displays the deletion you want. To submit the deletion to NSLDS, refer to the Loan Detail Update Help page.
3. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Update Reinsurance Claim Payment information

The Update Reinsurance Claim Payment information is defined as follows:

- **Delete**—Indicates the information should be deleted from NSLDS. The deletion takes effect when the information is submitted to NSLDS from the Loan Detail Update page.
- **Pending Status**—The addition, revision, or deletion that takes effect when the information is submitted to NSLDS from the Loan Detail Update page:

New—The status icon that displays when information is added.

Revised—The status icon that displays when information is revised.

Delete—The status icon that displays when information is deleted.

- **Date Requested (MMDDCCYY)**—The date when a Guaranty Agency requested reinsurance. (This is field code 114 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Cumulative Amount**—The dollar amount of a reinsurance claim requested of ED by a Guaranty Agency. Amount does not include claims that were made prior to repurchase. (This is field code 116 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Reason Code**—The code indicating the reason the latest reinsurance claim, including supplemental insurance, was paid to a Guaranty Agency. (This is field code 96 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)

The reason codes include the following:

Reason Code	Description
IX	Direct Loan Default
IN	Income Contingent Negative Amortization
FC	False Certification
EX	Exempt
BO	Bankruptcy, Other
BC	Bankruptcy, Chapter 13
DI	Disability
DF	Default
DE	Death
CS	Closed School

- **Date Paid (MMDDCCYY)**—The date when a Guaranty Agency receives the government reinsurance claim payment. (This is field code 115 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Rate Code**—The code indicating the rate at which the government paid a claim to a Guaranty Agency on a specific loan. (This is field code 119 as described in Appendix A of the Guaranty Agency Data Provider Instructions.) The rate codes include the following: Code 1 (100%); Code 2 (90%); Code 3 (80%); and Code 0 (0%).

Delete	Pending Status	Date Requested (MMDDCCYY)	Cumulative Amount	Reason Code	Date Paid (MMDDCCYY)	Rate Code
<input type="checkbox"/>	NEW	12/17/2001	750	BC	06/20/2001	0

Continue Cancel

Figure 5–28, Update Reinsurance Claim Payment Pop-Up

5.5.21 Add Bankruptcy Claim Refund

The Add Bankruptcy Claim Refund pop-up window (Figure 5–29) allows you to add the Bankruptcy Claim Refund information.

How to add the Bankruptcy Claim Refund information

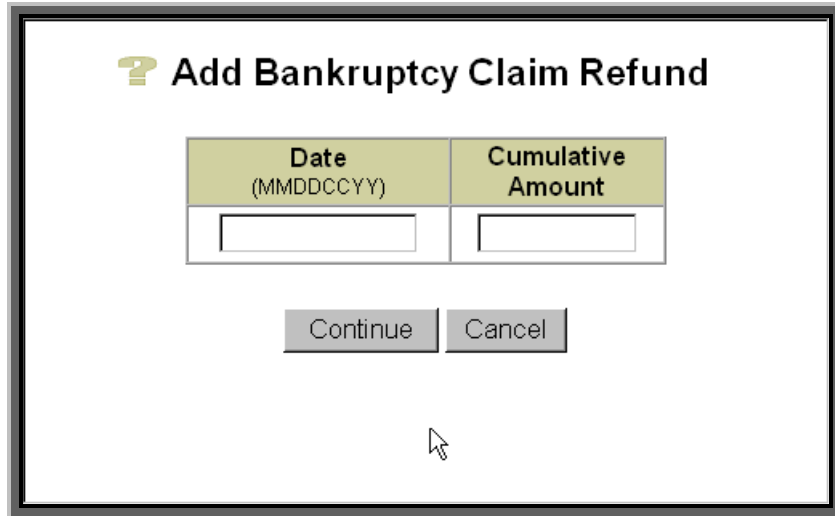
To add the Bankruptcy Claim Refund information:

1. In the **Date (MMDDCCYY)** box, type a date.
2. In the **Cumulative Amount** box, type an amount (do not use a \$ or a decimal).
3. Click **Continue** to return to the Loan Detail Update page, which displays the new information. To submit the new information to NSLDS, refer to the Loan Detail Update Help page.
4. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Add Bankruptcy Claim Refund information

The Add Bankruptcy Claim Refund information is defined as follows:

- **Date (MMDDCCYY)**—The date when a bankruptcy claim (previously paid as a reinsurance claim) was refunded to ED by a Guaranty Agency. (This is field code 145 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Cumulative Amount**—The cumulative amount remitted to ED for bankruptcy claim refund(s) on a loan. A guarantor refunds reinsurance to ED after the following sequence of events: the guarantor pays a bankruptcy claim to a lender before the bankruptcy court decides whether the loan is discharged; the guarantor collects reinsurance from ED; and the loan is *not* discharged by bankruptcy court. Amount does not include refunds that were made prior to repurchase. (This is field code 146 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)



The image shows a pop-up dialog box titled "Add Bankruptcy Claim Refund" with a yellow question mark icon. It contains two input fields: "Date (MMDDCCYY)" and "Cumulative Amount". Below these fields are "Continue" and "Cancel" buttons. A mouse cursor is pointing at the bottom center of the dialog box.

Date (MMDDCCYY)	Cumulative Amount
<input type="text"/>	<input type="text"/>

Figure 5–29, Add Bankruptcy Claim Refund Pop-Up

5.5.22 Update Bankruptcy Claim Refund

The Update Bankruptcy Claim Refund pop-up window (Figure 5–30) allows you to revise or delete the Bankruptcy Claim Refund information.

How to revise the Bankruptcy Claim Refund information

To revise the Bankruptcy Claim Refund information, you may type over the information that already displays in the text boxes:

1. In the **Date (MMDDCCYY)** box, type a date.
2. In the **Cumulative Amount** box, type an amount (do not use a \$ or a decimal).
3. Click **Continue** to return to the Loan Detail Update page, which displays the revision you want. To submit the revision to NSLDS, refer to the Loan Detail Update Help page.
4. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to delete the Bankruptcy Claim Refund information

To delete the Bankruptcy Claim Refund information:

1. Click the check box in the **Delete** column (to the left of the row to be deleted).
2. Click **Continue** to return to the Loan Detail Update page, which displays the deletion you want. To submit the deletion to NSLDS, refer to the Loan Detail Update Help page.
3. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Update Bankruptcy Claim Refund information

The Update Bankruptcy Claim Refund information is defined as follows:

- **Delete**—Indicates the information should be deleted from NSLDS. The deletion takes effect when the information is submitted to NSLDS from the Loan Detail Update page.
- **Pending Status**—The addition, revision, or deletion that takes effect when the information is submitted to NSLDS from the Loan Detail Update page:

New—The status icon that displays when information is added.

Revised—The status icon that displays when information is revised.

Delete—The status icon that displays when information is deleted.

- **Date (MMDDCCYY)**—The date when a bankruptcy claim (previously paid as a reinsurance claim) was refunded to ED by a Guaranty Agency. (This is field code 145 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Cumulative Amount**—The cumulative amount remitted to ED for bankruptcy claim refund(s) on a loan. A guarantor refunds reinsurance to ED after the following sequence of events: the guarantor pays a bankruptcy claim to a lender before the bankruptcy court decides whether the loan is discharged; the guarantor collects reinsurance from ED; and the loan is *not* discharged by bankruptcy court. Amount does not include refunds that were made prior to repurchase. (This is field code 146 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)

Delete	Pending Status	Date (MMDDCCYY)	Cumulative Amount
<input type="checkbox"/>		01/01/1990	1,000

Continue Cancel

Figure 5–30, Update Bankruptcy Claim Refund Pop-Up

5.5.23 Add Supplemental Reinsurance Claim Payment

The Add Supplemental Reinsurance Claim Payment pop-up window (Figure 5–31) allows you to add the Supplemental Reinsurance Payment Request information.

How to add the Supplemental Reinsurance Claim payment information

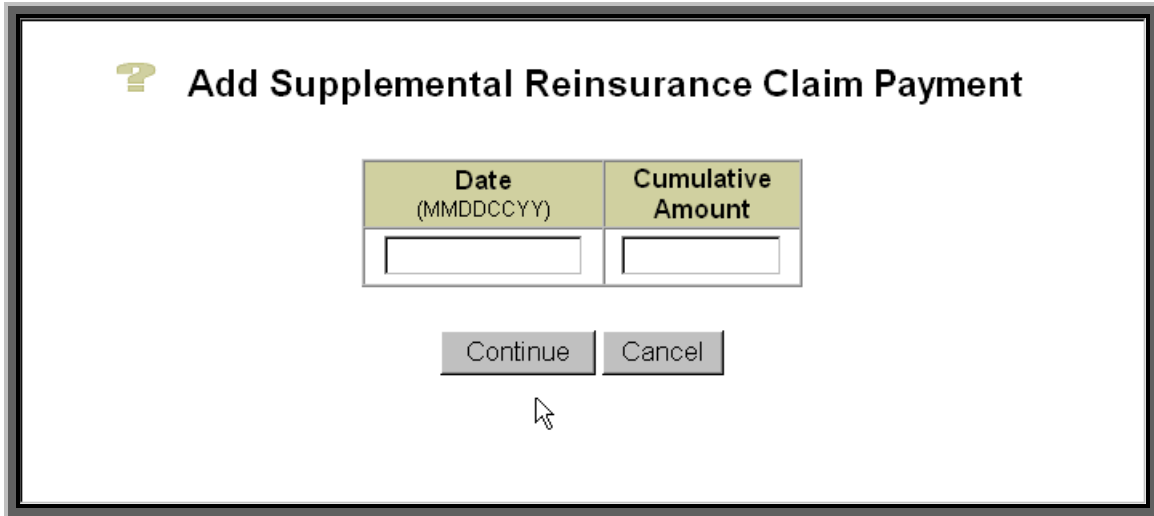
To add the Supplemental Reinsurance Claim Payment information:

1. In the **Date (MMDDCCYY)** box, type a date.
2. In the **Cumulative Amount** box, type an amount (do not use a \$ or a decimal).
3. Click **Continue** to return to the Loan Detail Update page, which displays the new information. To submit the new information to NSLDS, refer to the Loan Detail Update Help page.
4. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Add Supplemental Reinsurance Claim Payment information

The Add Supplemental Reinsurance Claim Payment information is defined as follows:

- **Date (MMDDCCYY)**—The date when a supplemental reinsurance claim payment is submitted to ED by a Guaranty Agency. (This is field code 117 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Cumulative Amount**—The cumulative dollar amount of supplemental reinsurance claim payment(s) of ED by a Guaranty Agency. Amount does not include payments that were made prior to repurchase. (This is field code 118 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)



The image shows a pop-up dialog box titled "Add Supplemental Reinsurance Claim Payment" with a yellow question mark icon. It contains two input fields: "Date (MMDDCCYY)" and "Cumulative Amount". Below these fields are "Continue" and "Cancel" buttons. A mouse cursor is pointing at the "Continue" button.

Date (MMDDCCYY)	Cumulative Amount
<input type="text"/>	<input type="text"/>

↖

Figure 5–31, Add Supplemental Reinsurance Claim Payment Pop-Up

5.5.24 Update Supplemental Reinsurance Payment Request

The Update Supplemental Reinsurance Payment Request pop-up window (Figure 5–32) allows you to revise or delete the Supplemental Reinsurance Payment Request information.

How to revise the Supplemental Reinsurance Payment Request information

To revise the Supplemental Reinsurance Payment Request information, you may type over the information that already displays in the text boxes:

1. In the **Date (MMDDCCYY)** box, type a date.
2. In the **Cumulative Amount** box, type an amount (do not use a \$ or a decimal).
3. Click **Continue** to return to the Loan Detail Update page, which displays the revision you want. To submit the revision to NSLDS, refer to the Loan Detail Update Help page.
4. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to delete the Supplemental Reinsurance Payment Request information

To delete the Supplemental Reinsurance Payment Request information:

1. Click the check box in the **Delete** column (to the left of the row to be deleted).
2. Click **Continue** to return to the Loan Detail Update page, which displays the deletion you want. To submit the deletion to NSLDS, refer to the Loan Detail Update Help page.
3. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Update Supplemental Reinsurance Payment Request information

The Update Supplemental Reinsurance Payment Request information is defined as follows:

- **Delete**—Indicates the information should be deleted from NSLDS. The deletion takes effect when the information is submitted to NSLDS from the Loan Detail Update page.
- **Pending Status**—The addition, revision, or deletion that takes effect when the information is submitted to NSLDS from the Loan Detail Update page:

New—The status icon that displays when information is added.

Revised—The status icon that displays when information is revised.

Delete—The status icon that displays when information is deleted.

- **Date (MMDDCCYY)**—The date when a supplemental reinsurance claim request is submitted to ED by a Guaranty Agency. (This is field code 117 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Cumulative Amount**—The cumulative dollar amount of supplemental reinsurance claim request(s) of ED by a Guaranty Agency. Amount does not include requests that were made prior to repurchase. (This is field code 118 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)


Delete	Pending Status	Date (MMDDCCYY)	Cumulative Amount
<input type="checkbox"/>		12/21/2001	750

Figure 5–32, Update Supplemental Reinsurance Payment Request Pop-Up

5.5.25 Add Repurchase Amount

The Add Repurchase Amount pop-up window (Figure 5–33) allows you to add the Repurchase Amount information.

How to add the Repurchase Amount information

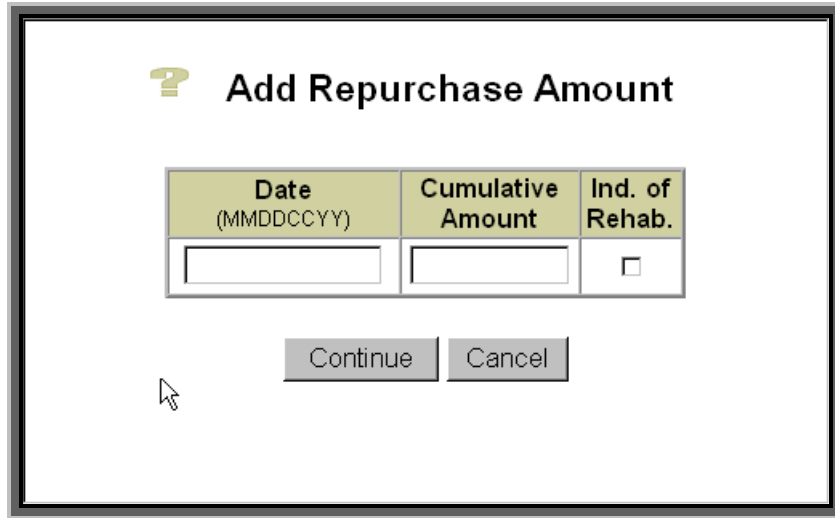
To add the Repurchase Amount information:

1. In the **Date (MMDDCCYY)** box, type a date.
2. In the **Cumulative Amount** box, type an amount (do not use a \$ or a decimal).
3. In the **Ind. of Rehab.** check box, click to indicate that a repurchased loan was a rehabilitated loan.
4. Click **Continue** to return to the Loan Detail Update page, which displays the new information. To submit the new information to NSLDS, refer to the Loan Detail Update Help page.
5. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Add Repurchase Amount information

The Add Repurchase Amount information is defined as follows:

- **Date (MMDDCCYY)**—The date when a loan previously paid by a claim is repurchased by a lender (reasons may include loan rehabilitation). (This is field code 120 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Cumulative Amount**—The total amount paid to a Guaranty Agency by a lender when an FFELP loan is repurchased (including repurchases of bankruptcy claims). (This is field code 121 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Ind. of Rehab.**—The indicator that a repurchased loan was a rehabilitated loan (that is, a defaulter made 12 consecutive payments on the loan and that it was sold to a lender by a Guaranty Agency). (This is field code 122 as described in Appendix A of the Guaranty Agency Data Provider Instructions.) On the Loan Detail Update page, a ‘Y’ for yes or an ‘N’ for no appears as a result of clicking or not clicking this check box.



The image shows a 'Pop-Up' dialog box titled 'Add Repurchase Amount'. It features a yellow question mark icon to the left of the title. Below the title is a table with three columns: 'Date (MMDDCCYY)', 'Cumulative Amount', and 'Ind. of Rehab.'. The 'Date' and 'Cumulative Amount' columns have text input fields, while the 'Ind. of Rehab.' column has a checkbox. Below the table are two buttons: 'Continue' and 'Cancel'. A mouse cursor is visible near the bottom left of the dialog box.

Date (MMDDCCYY)	Cumulative Amount	Ind. of Rehab.
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Figure 5–33, Add Repurchase Amount Pop-Up

5.5.26 Update Repurchase Amount

The Update Repurchase Amount pop-up window (Figure 5–34) allows you to revise or delete the Repurchase Amount information.

How to revise the Repurchase Amount information

To revise the Repurchase Amount information, you may type over the information that already displays in the text boxes:

1. In the **Date (MMDDCCYY)** box, type a date.
2. In the **Cumulative Amount** box, type an amount (do not use a \$ or a decimal).
3. In the **Ind. of Rehab** check box, click to indicate that a repurchased loan was a rehabilitated loan.
4. Click **Continue** to return to the Loan Detail Update page, which displays the revision you want. To submit the revision to NSLDS, refer to the Loan Detail Update Help page.
5. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to delete the Repurchase Amount information

To delete the Repurchase Amount information:

1. Click the check box in the **Delete** column (to the left of the row to be deleted).
2. Click **Continue** to return to the Loan Detail Update page, which displays the deletion you want. To submit the deletion to NSLDS, refer to the Loan Detail Update Help page.
3. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Update Repurchase Amount information

The Update Repurchase Amount information is defined as follows:

- **Delete**—Indicates the information should be deleted from NSLDS. The deletion takes effect when the information is submitted to NSLDS from the Loan Detail Update page.

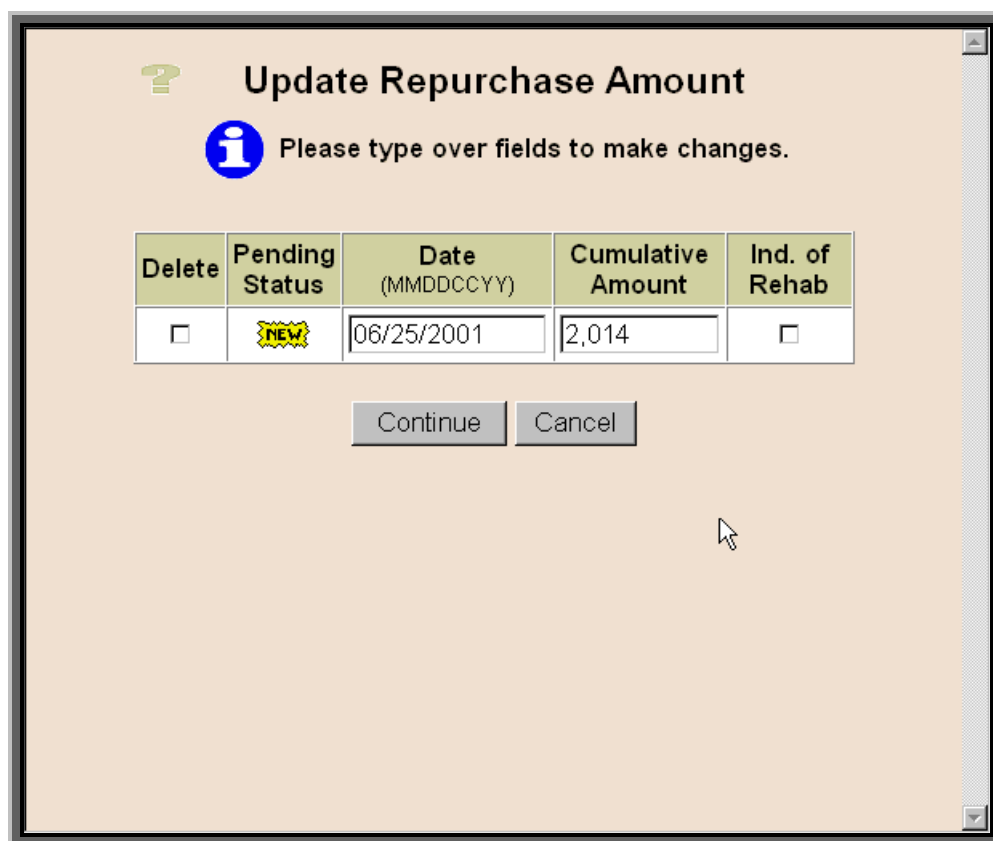
- **Pending Status**—The addition, revision, or deletion that takes effect when the information is submitted to NSLDS from the Loan Detail Update page:

New—The status icon that displays when information is added.

Revised—The status icon that displays when information is revised.

Delete—The status icon that displays when information is deleted.

- **Date (MMDDCCYY)**—The date when a loan previously paid by a claim is repurchased by a lender (reasons may include loan rehabilitation). (This is field code 120 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Cumulative Amount**—The total amount paid to a Guaranty Agency by a lender when an FFELP loan is repurchased (including repurchases of bankruptcy claims). (This is field code 121 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Ind. of Rehab**—The indicator that a repurchased loan was a rehabilitated loan (that is, a defaulter made 12 consecutive payments on the loan and that it was sold to a lender by a Guaranty Agency). (This is field code 122 as described in Appendix A of the Guaranty Agency Data Provider Instructions.) On the Loan Detail Update page, a ‘Y’ for yes or an ‘N’ for no appears as a result of clicking or not clicking this check box.



The image shows a web-based pop-up window titled "Update Repurchase Amount". It features a help icon and an information icon with the text "Please type over fields to make changes." Below this is a table with five columns: "Delete", "Pending Status", "Date (MMDDCCYY)", "Cumulative Amount", and "Ind. of Rehab". The table contains one row with the following values: an unchecked checkbox for "Delete", a yellow "NEW" badge for "Pending Status", the date "06/25/2001" for "Date", the amount "2,014" for "Cumulative Amount", and an unchecked checkbox for "Ind. of Rehab". At the bottom of the window are "Continue" and "Cancel" buttons. A mouse cursor is visible near the bottom right of the window.

Delete	Pending Status	Date (MMDDCCYY)	Cumulative Amount	Ind. of Rehab
<input type="checkbox"/>	NEW	06/25/2001	2,014	<input type="checkbox"/>

Continue Cancel

Figure 5–34, Update Repurchase Amount Pop-Up

5.5.27 Add TOP (Treasury Offset Program)

The Add TOP (Treasury Offset Program) pop-up window (Figure 5–35) allows you to add the TOP Offset information.

How to add the TOP Offset information

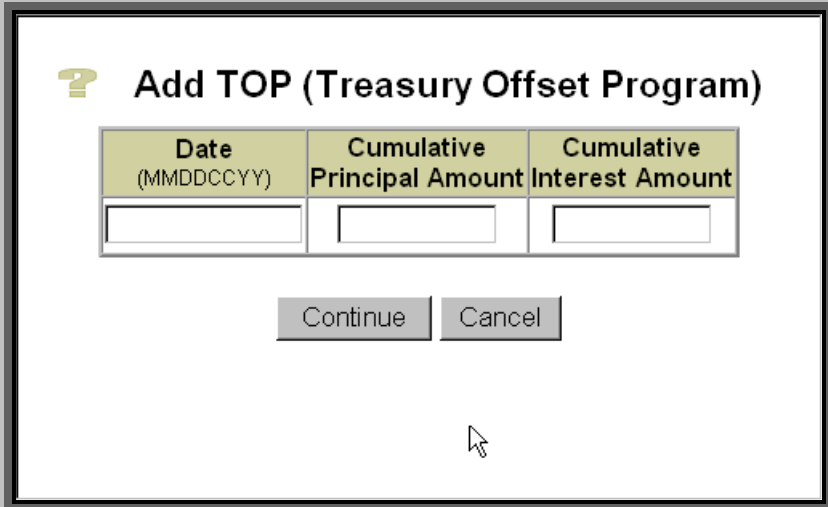
To add the TOP Offset information:

1. In the **Date (MMDDCCYY)** box, type a date.
2. In the **Cumulative Principal Amount** box, type an amount (do not type a \$ or a decimal).
3. In the **Cumulative Interest Amount** box, type an amount (do not type a \$ or a decimal).
4. Click **Continue** to return to the Loan Detail Update page, which displays the new information. To submit the new information to NSLDS, refer to the Loan Detail Update Help page.
5. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Add TOP (Treasury Offset Program) information

The Add TOP (Treasury Offset Program) information is defined as follows:

- **Date (MMDDCCYY)**—The date when the Guaranty Agency last applied TOP (formerly IRS offset) principal and/or interest collections to a loan. (This is field code 127 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Cumulative Principal Amount**—The cumulative amount collected and applied to principal through TOP (formerly IRS) offset. Amount does not include collections that were made prior to repurchase. (This is field code 130 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Cumulative Interest Amount**—The cumulative amount collected and applied to interest through TOP (formerly IRS) offset. Amount does not include collections that were made prior to repurchase. (This is field code 128 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)



A pop-up dialog box titled "Add TOP (Treasury Offset Program)" with a question mark icon. It contains a table with three columns: "Date (MMDDCCYY)", "Cumulative Principal Amount", and "Cumulative Interest Amount". Each column has a corresponding text input field. Below the table are "Continue" and "Cancel" buttons. A mouse cursor is visible near the bottom center of the dialog.

Date (MMDDCCYY)	Cumulative Principal Amount	Cumulative Interest Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>

Figure 5–35, Add TOP (Treasury Offset Program) Pop-Up

5.5.28 Update TOP (Treasury Offset Program)

The Update TOP (Treasury Offset Program) pop-up window (Figure 5–36) allows you to revise or delete the TOP Offset information.

How to revise the TOP Offset information

To revise the TOP Offset information, you may type over the information that already displays in the text boxes:

1. In the **Date (MMDDCCYY)** box, type a date.
2. In the **Cumulative Principal Amount** box, type an amount (do not use a \$ or a decimal).
3. In the **Cumulative Interest Amount** box, type an amount (do not use a \$ or a decimal).
4. Click **Continue** to return to the Loan Detail Update page, which displays the revision you want. To submit the revision to NSLDS, refer to the Loan Detail Update Help page.
5. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to delete the TOP Offset information

To delete the TOP Offset information:

1. Click the check box in the **Delete** column (to the left of the row to be deleted).
2. Click **Continue** to return to the Loan Detail Update page, which displays the deletion you want. To submit the deletion to NSLDS, refer to the Loan Detail Update Help page.
3. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Update TOP (Treasury Offset Program) information

The Update TOP (Treasury Offset Program) information is defined as follows:

- **Delete**—Indicates the information should be deleted from NSLDS. The deletion takes effect when the information is submitted to NSLDS from the Loan Detail Update page.
- **Pending Status**—The addition, revision, or deletion that takes effect when the information is submitted to NSLDS from the Loan Detail Update page:

New—The status icon that displays when information is added.

Revised—The status icon that displays when information is revised.

Delete—The status icon that displays when information is deleted.

- **Date (MMDDCCYY)**—The date when the Guaranty Agency last applied TOP (formerly IRS) offset principal and/or interest collections to a loan. (This is field code 127 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Cumulative Principal Amount**—The cumulative amount collected and applied to principal through TOP (formerly IRS) offset. Amount does not include collections that were made prior to repurchase. (This is field code 130 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Cumulative Interest Amount**—The cumulative amount collected and applied to interest through TOP (formerly IRS) offset. Amount does not include collections that were made prior to repurchase. (This is field code 128 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)

Delete	Pending Status	Date (MMDDCCYY)	Cumulative Principal Amount	Cumulative Interest Amount
<input type="checkbox"/>		01/01/1990	100	1,000

Continue Cancel

Figure 5–36, Update TOP (Treasury Offset Program) Pop-Up

5.5.29 Add Collection

The Add Collection pop-up window (Figure 5–37) allows you to add the Collection Principal information.

How to add the Collection Principal information

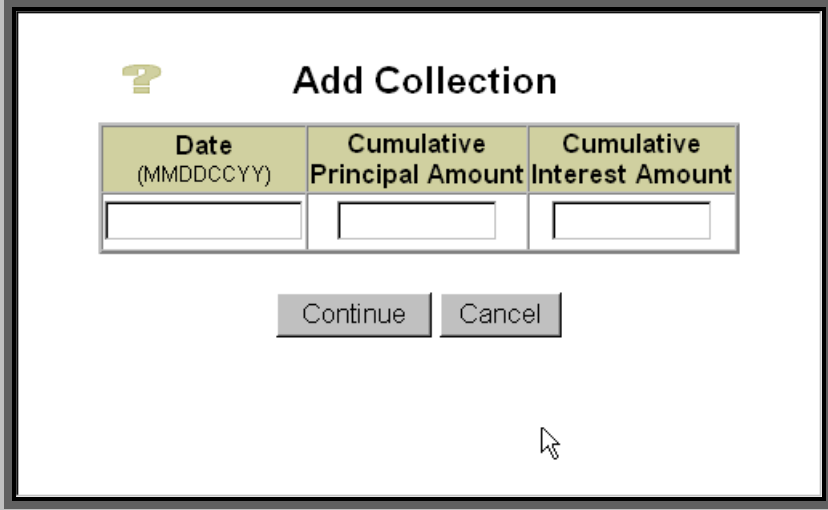
To add the Collection Principal information:

1. In the **Date (MMDDCCYY)** box, type a date.
2. In the **Cumulative Principal Amount** box, type an amount (do not use a \$ or a decimal).
3. In the **Cumulative Interest Amount** box, type an amount (do not use a \$ or a decimal).
4. Click **Continue** to return to the Loan Detail Update page, which displays the new information. To submit the new information to NSLDS, refer to the Loan Detail Update Help page.
5. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Add Collection information

The Add Collection information is defined as follows:

- **Date (MMDDCCYY)**—The date when the Guaranty Agency last applied default collections (excluding TOP [formerly IRS] offset) or bankruptcy recovery to the loan principal and/or interest. (This is field code 123 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Cumulative Principal Amount**—The cumulative amount of Guaranty Agency default collections (excluding TOP [formerly IRS] collections) or bankruptcy recovery applied to loan principal. Amount does not include collections that were made prior to repurchase. Collections such as administrative wage garnishment (AWG) and state tax offsets are included. (This is field code 126 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Cumulative Interest Amount**—The cumulative amount of Guaranty Agency default collections (excluding TOP [formerly IRS] collections) or bankruptcy recovery applied to loan interest. Amount does not include collections that were made prior to repurchase. Collections such as administrative wage garnishment (AWG) and state tax offsets are included. (This is field code 124 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)



The image shows a 'Add Collection' pop-up dialog box. It features a yellow question mark icon in the top left corner. The title 'Add Collection' is centered at the top. Below the title is a table with three columns: 'Date (MMDDCCYY)', 'Cumulative Principal Amount', and 'Cumulative Interest Amount'. Each column has a corresponding text input field. At the bottom of the dialog, there are two buttons: 'Continue' and 'Cancel'. A mouse cursor is visible near the bottom right of the dialog box.

Date (MMDDCCYY)	Cumulative Principal Amount	Cumulative Interest Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>

Figure 5–37, Add Collection Pop-Up

5.5.30 Update Collection

The Update Collection pop-up window (Figure 5–38) allows you to revise or delete the Collection Principal information.

How to revise the Collection Principal information

To revise the Collection Principal information, you may type over the information that already displays in the text boxes:

1. In the **Date (MMDDCCYY)** box, type a date.
2. In the **Cumulative Principal Amount** box, type an amount (do not use a \$ or a decimal).
3. In the **Cumulative Interest Amount** box, type an amount (do not use a \$ or a decimal).
4. Click **Continue** to return to the Loan Detail Update page, which displays the revision you want. To submit the revision to NSLDS, refer to the Loan Detail Update Help page.
5. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to delete the Collection Principal information

To delete the Collection Principal information:

1. Click the check box in the **Delete** column (to the left of the row to be deleted).
2. Click **Continue** to return to the Loan Detail Update page, which displays the deletion you want. To submit the deletion to NSLDS, refer to the Loan Detail Update Help page.
3. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Update Collection information

The Update Collection information is defined as follows:

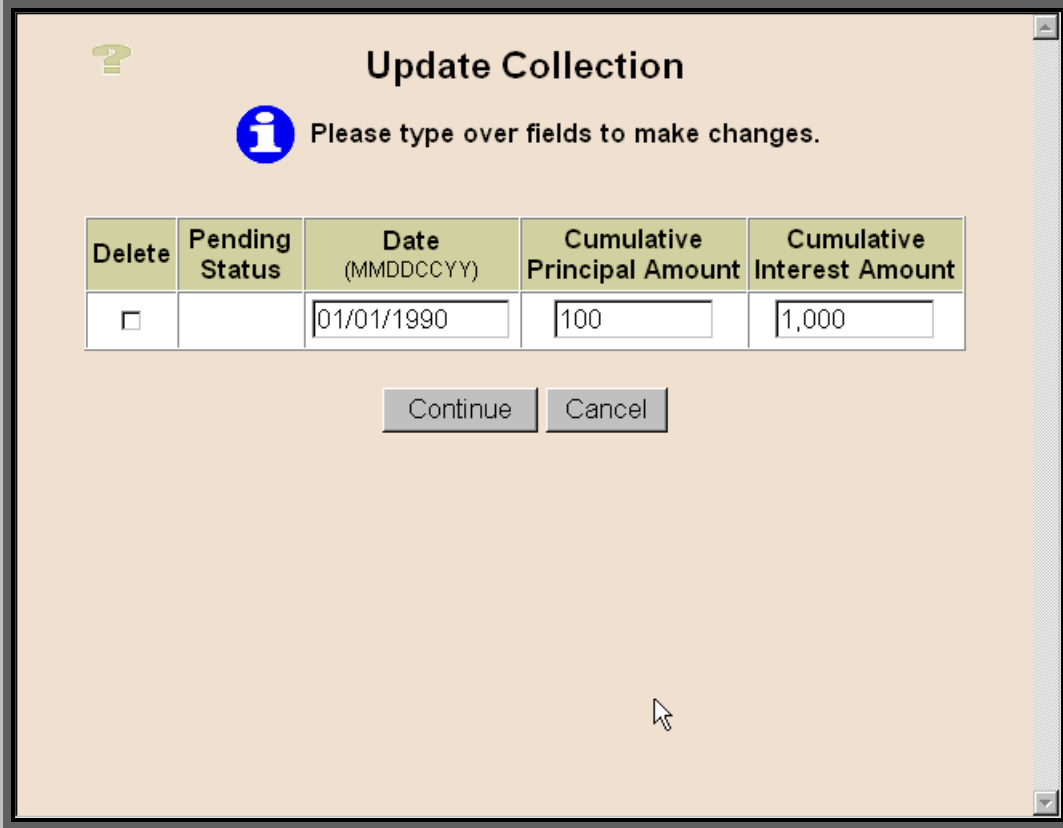
- **Delete**—Indicates the information should be deleted from NSLDS. The deletion takes effect when the information is submitted to NSLDS from the Loan Detail Update page.
- **Pending Status**—The addition, revision, or deletion that takes effect when the information is submitted to NSLDS from the Loan Detail Update page:

New—The status icon that displays when information is added.

Revised—The status icon that displays when information is revised.

Delete—The status icon that displays when information is deleted.

- **Date (MMDDCCYY)**—The date when the Guaranty Agency last applied default collections (excluding TOP [formerly IRS] offset) or bankruptcy recovery to the loan principal and/or interest. (This is field code 123 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Cumulative Principal Amount**—The cumulative amount of Guaranty Agency default collections (excluding TOP [formerly IRS] collections) or bankruptcy recovery applied to loan principal. Amount does not include collections that were made prior to repurchase. Collections such as administrative wage garnishment (AWG) and state tax offsets are included. (This is field code 126 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Cumulative Interest Amount**—The cumulative amount of Guaranty Agency default collections (excluding TOP [formerly IRS] collections) or bankruptcy recovery applied to loan interest. Amount does not include collections that were made prior to repurchase. Collections such as administrative wage garnishment (AWG) and state tax offsets are included. (This is field code 124 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)



The image shows a software dialog box titled "Update Collection". It has a light beige background and a dark border. At the top left is a small green question mark icon. The title "Update Collection" is centered at the top in a bold black font. Below the title is a blue circular icon with a white lowercase 'i', followed by the text "Please type over fields to make changes." in a standard black font. In the center of the dialog is a table with five columns. The first column is labeled "Delete" and contains a small square checkbox. The second column is labeled "Pending Status" and is currently empty. The third column is labeled "Date (MMDDCCYY)" and contains the text "01/01/1990". The fourth column is labeled "Cumulative Principal Amount" and contains the number "100". The fifth column is labeled "Cumulative Interest Amount" and contains the number "1,000". Below the table are two buttons: "Continue" and "Cancel". A mouse cursor is visible near the bottom center of the dialog box.

Delete	Pending Status	Date (MMDDCCYY)	Cumulative Principal Amount	Cumulative Interest Amount
<input type="checkbox"/>		01/01/1990	100	1,000

Continue Cancel

Figure 5–38, Update Collection Pop-Up

5.5.31 Transfer Guaranty Agency for Loan

The Transfer Guaranty Agency for Loan pop-up window (Figure 5–39) allows you to transfer the Guaranty Agency information to an organization.

How to transfer the Guaranty Agency information

To transfer the Guaranty Agency information:

1. In the **Start Date (MMDDCCYY)** box, type a date.
2. In the **Code** box, type a code. Click **Search** to search for a code.
3. Click **Continue** to return to the Loan Detail Update page, which displays the transferred information. To submit the transferred information to NSLDS, refer to the Loan Detail Update Help page.
4. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Transfer Guaranty Agency for Loan information

The Transfer Guaranty Agency for Loan information is defined as follows:

- **Start Date (MMDDCCYY)**—The date when a loan guaranty is transferred from one Guaranty Agency to another or to the Federal government. The date is reported by the receiving agency. (This is field code 90 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Code**—The identification code for a Guaranty Agency guaranteeing an FFELP loan. (This is field code 20 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)

? Transfer Guaranty Agency for Loan

Start Date (MMDDCCYY)	Code
<input type="text"/>	<input type="text"/> <input type="button" value="Search"/>

Figure 5–39, Transfer Guaranty Agency for Loan Pop-Up

5.5.32 Update Guaranty Agency for Loan

The Update Guaranty Agency for Loan pop-up window (Figure 5–40) allows you to revise or delete the Guaranty Agency information.

How to revise the Guaranty Agency information

To revise the Guaranty Agency information, you may type over the information that already displays in the text boxes:

1. In the **Start Date (MMDDCCYY)** box, type a date.
2. In the **End Date (MMDDCCYY)** box, type a date.
3. In the **Code** box, type a code.
4. Click **Continue** to return to the Loan Detail Update page, which displays the revision you want. To submit the revision to NSLDS, refer to the Loan Detail Update Help page.
5. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to delete the Guaranty Agency information

To delete the Guaranty Agency information:

1. Click the check box in the **Delete** column (to the left of the row to be deleted).
2. Click **Continue** to return to the Loan Detail Update page, which displays the deletion you want. To submit the deletion to NSLDS, refer to the Loan Detail Update Help page.
3. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Update Guaranty Agency for Loan information

The Update Guaranty Agency for Loan information is defined as follows:

- **Delete**—Indicates the information should be deleted from NSLDS. The deletion takes effect when the information is submitted to NSLDS from the Loan Detail Update page.
- **Pending Status**—The addition, revision, or deletion that takes effect when the information is submitted to NSLDS from the Loan Detail Update page:

New—The status icon that displays when information is added.

Revised—The status icon that displays when information is revised.

Delete—The status icon that displays when information is deleted.

- **Start Date (MMDDCCYY)**—The date when a loan guaranty is transferred from one guaranty agency to another or to the Federal government. The date is reported by the receiving agency. (This is field code 90 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **End Date (MMDDCCYY)**—The date after which a loan guaranty is transferred from one guaranty agency to another guaranty agency or to the Federal government.
- **Code**—The identification code for a guaranty agency guaranteeing an FFELP loan. (This is field code 20 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)

Update Guaranty Agency for Loan

Please type over fields to make changes.

Delete	Pending Status	Start Date (MMDDCCYY)	End Date (MMDDCCYY)	Code
<input type="checkbox"/>		01/01/1990	CURRENT	611

Continue Cancel

Figure 5–40, Update Guaranty Agency for Loan Pop-Up

5.5.33 Add Lender for Loan

The Add Lender for Loan pop-up window (Figure 5–41) allows you to add the Lender information.

How to add the Lender information

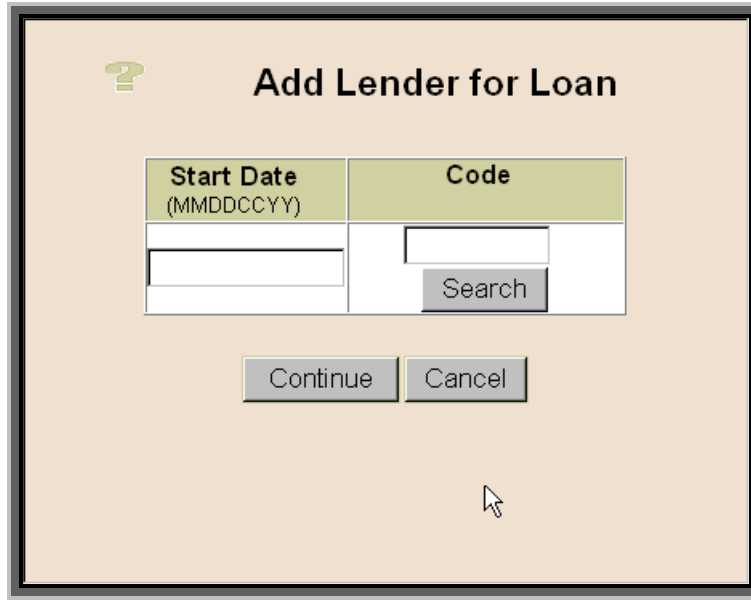
To add the Lender information:

1. In the **Start Date (MMDDCCYY)** box, type a date.
2. In the **Code** box, type a code, or click **Search** to search for a lender code.
3. Click **Continue** to return to the Loan Detail Update page, which displays the new information. To submit the new information to NSLDS, refer to the Loan Detail Update Help page.
4. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Add Lender for Loan information

The Add Lender for Loan information is defined as follows:

- **Start Date (MMDDCCYY)**—The date when a loan was sold by one lender to another, as reported by the receiving lender. (This is field code 141 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Code**—The ED code indicating current holder of an FFELP loan or (if a claim has been paid) the lender who submitted the claim. (This is field code 134 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)



The image shows a 'Pop-Up' dialog box titled 'Add Lender for Loan'. In the top-left corner, there is a green question mark icon. The title is centered at the top. Below the title, there is a form with two columns. The left column is headed 'Start Date (MMDDCCYY)' and contains two empty text input fields. The right column is headed 'Code' and contains one empty text input field. A 'Search' button is located at the bottom of the right column. Below the form, there are two buttons: 'Continue' and 'Cancel'. A mouse cursor is visible near the bottom right of the dialog box.

Start Date (MMDDCCYY)	Code
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="button" value="Search"/>

Figure 5–41, Add Lender for Loan Pop-Up

5.5.34 Update Lender for Loan

The Update Lender for Loan pop-up window (Figure 5–42) allows you to revise or delete the Lender information.

How to revise the Lender information

To revise the Lender information, you may type over the information that already displays in the text boxes:

1. In the **Start Date (MMDDCCYY)** box, type a date.
2. In the **End Date (MMDDCCYY)** box, type a date.
3. In the **Code** box, type a code. Click **Search** to search for a code.
4. Click **Continue** to return to the Loan Detail Update page, which displays the revision you want. To submit the revision to NSLDS, refer to the Loan Detail Update Help page.
5. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to delete the Lender information

To delete the Lender information:

1. Click the check box in the **Delete** column (to the left of the row to be deleted).
2. Click **Continue** to return to the Loan Detail Update page, which displays the deletion you want. To submit the deletion to NSLDS, refer to the Loan Detail Update Help page.
3. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Update Lender for Loan information

The Update Lender for Loan information is defined as follows:

- **Delete**—Indicates the information should be deleted from NSLDS. The deletion takes effect when the information is submitted to NSLDS from the Loan Detail Update page.
- **Pending Status**—The addition, revision, or deletion that takes effect when the information is submitted to NSLDS from the Loan Detail Update page:

New—The status icon that displays when information is added.

Revised—The status icon that displays when information is revised.

Delete—The status icon that displays when information is deleted.

- **Start Date (MMDDCCYY)**—The date when a loan was sold by one lender to another, as reported by the receiving lender. (This is field code 141 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **End Date (MMDDCCYY)**—The date after which a loan is sold by one lender to another.
- **Code**—The ED code indicating current holder of an FFELP loan or (if a claim has been paid) the lender who submitted the claim. (This is field code 134 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)

Delete	Pending Status	Start Date (MMDDCCYY)	End Date (MMDDCCYY)	Code
<input type="checkbox"/>		01/01/1990	CURRENT	800001 Search
<input type="checkbox"/>		01/01/1988	12/31/1989	800001 Search

Continue Cancel

Figure 5–42, Update Lender for Loan Pop-Up

5.5.35 Add Servicer Agent for Loan

The Add Servicer Agent for Loan pop-up window (Figure 5–43) allows you to add the Servicer Agent information.

How to add the Servicer Agent information

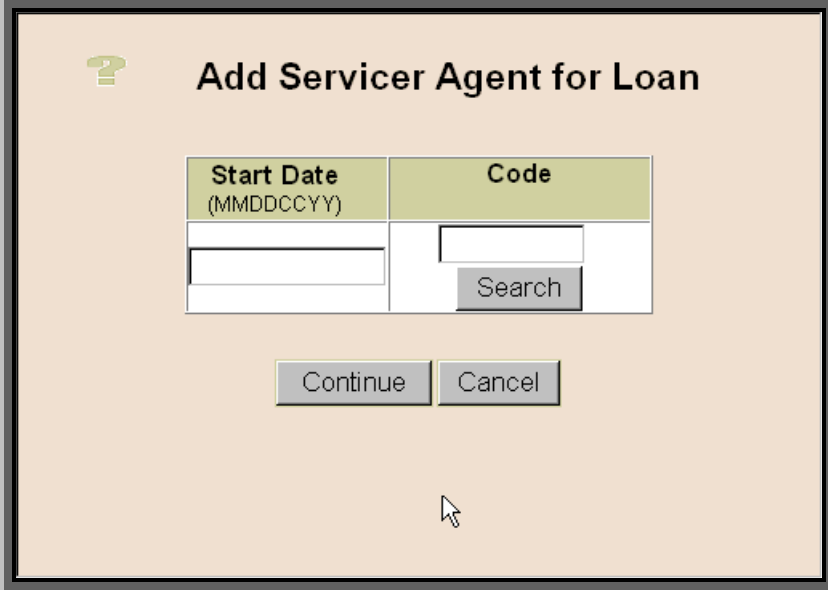
To add the Servicer Agent information:

1. In the **Start Date (MMDDCCYY)** box, type a date.
2. In the **Code** box, type a code. Click **Search** to search for a code.
3. Click **Continue** to return to the Loan Detail Update page, which displays the new information. To submit the new information to NSLDS, refer to the Loan Detail Update Help page.
4. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Add Servicer Agent for Loan information

The Add Servicer Agent for Loan information is defined as follows:

- **Start Date (MMDDCCYY)**—The date when a servicer agent assumes responsibility for servicing a loan. (This is field code 150 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **Code**—The ED code indicating current holder of an FFELP loan or (if a claim has been paid) the servicer agent who submitted the claim. (This is field code 88 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)



The image shows a 'Pop-Up' dialog box titled 'Add Servicer Agent for Loan'. It features a green question mark icon in the top left corner. The main content area contains two input fields: 'Start Date (MMDDCCYY)' and 'Code'. The 'Start Date' field is a text box with a calendar icon. The 'Code' field is a text box with a 'Search' button next to it. Below these fields are two buttons: 'Continue' and 'Cancel'. A mouse cursor is visible near the bottom center of the dialog box.

Start Date (MMDDCCYY)	Code
<input type="text"/>	<input type="text"/>
	<input type="button" value="Search"/>

Figure 5–43, Add Servicer Agent for Loan Pop-Up

5.5.36 Update Servicer Agent for Loan

The Update Servicer Agent for Loan pop-up window (Figure 5–44) allows you to revise or delete the Servicer Agent information.

How to revise the Servicer Agent information

To revise the Servicer Agent information, you may type over the information that already displays in the text boxes:

1. In the **Start Date (MMDDCCYY)** box, type a date.
2. In the **End Date (MMDDCCYY)** box, type a date.
3. In the **Code** box, type a code. Click **Search** to search for a code.
4. Click **Continue** to return to the Loan Detail Update page, which displays the revision you want. To submit the revision to NSLDS, refer to the Loan Detail Update Help page.
5. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to delete the Servicer Agent information

To delete the Servicer Agent information:

1. Click the check box in the **Delete** column (to the left of the row to be deleted).
2. Click **Continue** to return to the Loan Detail Update page, which displays the deletion you want. To submit the deletion to NSLDS, refer to the Loan Detail Update Help page.
3. Click **Cancel** to return to the Loan Detail Update page, which does not display any updated information.

How to interpret the Update Servicer Agent for Loan information

The Update Servicer Agent for Loan information is defined as follows:

- **Delete**—Indicates the information should be deleted from NSLDS. The deletion takes effect when the information is submitted to NSLDS from the Loan Detail Update page.
- **Pending Status**—The addition, revision, or deletion that takes effect when the information is submitted to NSLDS from the Loan Detail Update page:

New—The status icon that displays when information is added.

Revised—The status icon that displays when information is revised.

Delete—The status icon that displays when information is deleted.

- **Start Date (MMDDCCYY)**—The date when a servicer agent assumes responsibility for servicing a loan. (This is field code 150 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)
- **End Date (MMDDCCYY)**—The date after which a servicer agent no longer assumes responsibility for servicing a loan.
- **Code**—The ED code indicating current holder of an FFELP loan or (if a claim has been paid) the servicer agent who submitted the claim. (This is field code 88 as described in Appendix A of the Guaranty Agency Data Provider Instructions.)

Delete	Pending Status	Start Date (MMDDCCYY)	End Date (MMDDCCYY)	Code
<input type="checkbox"/>		01/01/1990	CURRENT	700001 Search

Continue Cancel

Figure 5–44, Update Servicer Agent for Loan Pop-Up

5.6 Overpayment History

The Overpayment History page (Figure 5–45) summarizes past and present Perkins Loan, Supplemental Educational Opportunity Grant (SEOG), and Pell Grant overpayments for students. You can add or update an overpayment if you have authorized access.

How to Interpret Warning Symbols and Information Icons

The warning and informational icons at the top of the Loan History page reflect the status of loans and other aid for which the borrower is personally responsible. Users wishing to check the status of PLUS borrowers who have taken out loans on behalf of students should view the Loan History page for the PLUS borrower and not rely on the student's page to verify the eligibility of the PLUS borrower for further aid.

- **Bankruptcy**—The borrower has one or more loans in active bankruptcy status.
- **Defaulted**—The borrower has one or more loans in default status.
- **Overpayments**—The borrower has one or more active overpayments that have not been deferred, waived, or had satisfactory arrangements made for them.
- **Discharged**—The borrower has one or more loans with a discharge code. Discharges are identified according to the following order of precedence:
 - *Death*
 - *Reaffirm*
 - *Conditional*
 - *Permanent*
 - *Multiple*
- **Additional Unsub**—The borrower has a Direct Stafford Unsubsidized (D2) loan with Additional Health Profession or PLUS Denial indicators.
- **Close to Sub. Limit**—The borrower is close to the aggregate limit for subsidized loans.
- **Exceeds Sub. Limit**—The borrower exceeds the aggregate limit for subsidized loans.
- **Close to Comb. Limit**—The borrower is close to the aggregate limit for subsidized, unsubsidized, and/or FFEL Consolidation, Unallocated loans combined.
- **Exceeds Comb. Limit**—The borrower exceeds the aggregate limit for subsidized, unsubsidized, and/or FFEL Consolidation, Unallocated loans combined.

- **Pell Grant**—The borrower has received one or more Pell Grants for the current award year or the prior award year.

How to add and update an Overpayment

- To add an Overpayment, click **Add Overpayment**.
- To update the Overpayment History, click the number icon.
- To access the Organization Contact page, click the school name.


How to interpret the Overpayment History

The Overpayment History table, sorted in ascending order by school, school branch, disbursement date, and type, displays the following information:

- **Type**—The Title IV student assistance funds type for which the student has received an amount in excess of what the student is eligible to receive. Three types are maintained in NSLDS:
 - **Perkins**—Federal Perkins Loans. These loans include the National Defense Loan (DU), the Perkins Expanded Lending (EU), the Income Contingent Loan (IC), the National Direct Student Loan (NU), and the Federal Perkins Loan (PU).
 - **SEOG**—Federal Supplemental Education Opportunity Grant, a campus-based program. These grants go to undergraduate students of exceptional financial need who have not completed their first baccalaureate degree and who are financially in need of this grant to enable them to pursue their education.
 - **Pell Grant**—A federal grant to help undergraduates pay for their education after high school.
- **Ind**—One of three identifiers that indicate the status of the overpayment.
 - **Overpayment**—This is the value that a school uses when first entering an active overpayment into the system. It means that the student owes the overpayment, has not made satisfactory arrangements to repay, and should be considered ineligible for additional Title IV aid until the overpayment is repaid or otherwise resolved.
 - **Repaid**—This value means that a previously reported overpayment that was in either an active Overpayment or Satisfactory Arrangement Made status has been fully repaid by the student. Schools should update the NSLDS when the final payment has been made. The date that the final payment of the overpayment was

made should be entered at that time. A value of Repaid will not produce the Overpayment flags and messages on SARs and ISIRs.

- **Satisfactory Arrangement Made**—This value means that while the student still owes the overpayment, he or she has made arrangements that are satisfactory to the school to repay the overpayment. This status, when reported to other schools on a SAR or ISIR (or in the FAT process of the NSLDS), will provide documentation that the student may continue to receive Title IV aid. In the event that the student fails to meet the commitment made with the school for the arrangements to repay, the school should immediately reset the Overpayment Indicator to Overpayment. A status of Satisfactory Arrangement Made will not produce the Overpayment flags and messages on SARs and ISIRs.
- **Disbursement Date**—Date the award was made.
- **Repayment Date**—Date the overpayment was satisfied.
- **Create Date**—Date the overpayment was entered into NSLDS. This is automatically updated with the system date.
- **Source**—Codes identifying where the overpayment exists:
 - **Transfer**—When a school has transferred an overpayment to the Department of Education's Debt Collection Service (DCS), the school should update the previously reported overpayment information in NSLDS by changing the Source field from SCH to TRF. This change will not invalidate the overpayment, but it will inform any user of the system that the debt is in the process of being transferred from the school to DCS.
 - **School**—Whenever a school is attempting to add a new or update an existing overpayment record, this field is automatically updated with SCH.
 - **ED Region**—The debt is now held by one of the U.S. Department of Education's Debt Collection Service regional offices.
 - **Updated**—The date the overpayment was last updated and the person performing the update is shown under the Source. This information is automatically updated by the system.









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[Loan History](#) | **[Overpayment History](#)** | [Pell Grant](#) | [Student Access Interface](#)


SSN: First Name: DOB: (MMDDCCYY) [Retrieve](#)

Logged on as: SAM BRUTCHER from [ALLAN HANCOCK COLLEGE](#)



STEVEN J OTTEN
SSN: 556-44-1003 DOB: 03/08/1979

Bankruptcy Defaulted OverpaymentsDischarged Additional Sub Limit
Death Unsub

 Pell Grants

Overpayment History

	Type	Ind	Disbursement Date	Repayment Date	Create Date	Source
1	PERKINS LOAN	OVERPAYMENT	04/03/2001	N/A	09/11/2002	School
						UNIVERSITY OF CALIFORNIA - SANTA CLAUS 0  Updated: 09/11/2002 by MICHAEL WAID
2	SUPPLEMENTAL EDUCATIONAL OPPORTUNITY GRANT	OVERPAYMENT	03/27/2002	N/A	09/11/2002	School
						UNIVERSITY OF CALIFORNIA - SANTA CLAUS 0  Updated: 09/11/2002 by MICHAEL WAID


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Figure 5–45, Overpayment History

5.6.1 Overpayment Add

The Overpayment Add page (Figure 5–46) allows you to enter information about students who owe an overpayment on a Title IV grant or a Perkins loan. Overpayment data reported by schools is added to the NSLDS and then transferred to the Central Processing System for inclusion on SARs and ISIRs.

How to add Overpayment information

To add overpayment information:

1. In the **School OPEID** box, type the school code.
2. In the **Type** list, click an option. (See list of definitions below.)
3. In the **Disbursement Date** box, type the Disbursement Date.
4. In the **Indicator** list, click an option. (See list of definitions below.)
5. In the **Repayment Date** box, type the Repayment Date, if applicable.
6. In the **Source** list, click an option. (See list of definitions below.)
7. In the **Region Code** list, click a region code. (Only applicable to Department of Education users.)
8. Click **Submit**.

The Overpayment History page will appear (Figure 5–47), with the new record displayed.

Notes:

- The **School OPEID** will automatically appear if you represent a school.
- **Org Search** allows you to search and select a **School OPEID**. Click **Org Search** and select a School OPEID by clicking the numbered bullet next to the school. Your selection will appear in the School OPEID box.


How to interpret Overpayment Add information

The Overpayment Add page allows entry of the following information:




- **School OPEID**—An eight-digit ED OPE code used to identify the school and school branch.

- **Type**—The Title IV student assistance funds type for which the student has received an amount in excess of what the student is eligible to receive. The following Types are maintained in the NSLDS:
 - **FEDERAL PELL GRANT**—A Federal award. These grants help undergraduates pay for their education.
 - **PERKINS LOAN**—Federal Perkins Loans. These loans include the National Defense Loan (DU), the Perkins Expanded Lending (EU), the National Direct Student Loan (NU), and the Federal Perkins Loan (PU).
 - **SUPPLEMENTAL EDUCATIONAL OPPORTUNITY GRANT**—Federal Supplemental Education Opportunity Grant. A campus-based grant program based on financial need for undergraduate students who have not completed their first baccalaureate degree.
- **Disbursement Date**—The date the aid was disbursed. It is important to note that the Disbursement Date the school uses must be the same date that the school used on the letters and forms assigning the obligation to Debt Collection Service.
- **Indicator**—One of three codes identifying the status of the overpayment:
 - **OVERPAYMENT**—A school uses this Indicator when first entering an active overpayment into the system. It means that the student owes the overpayment and has not made a satisfactory arrangement to repay. Therefore, the student should be considered ineligible for additional Title IV aid until the overpayment is repaid or otherwise resolved.
 - **Note:** When OVERPAYMENT is selected and submitted, the Ind box on the Overpayment History page will display OVERPAYMENT in red shading.
 - **SATISFACTORY ARRANGEMENT MADE**—This Indicator means that although the student still owes the overpayment, he or she has made arrangements that are satisfactory to the school to repay the overpayment. A status of S reported to other schools on a SAR or ISIR (or in the FAT process of the NSLDS) will provide documentation that the student may continue to receive Title IV aid. In the event that the student fails to meet the commitment made with the school for the arrangements to repay, the school should immediately reset the Indicator to OVERPAYMENT.
 - **Note:** When SATISFACTORY ARRANGEMENT MADE is selected and submitted, the **Ind** box on the Overpayment History page will display SATISFACTORY ARRANGEMENT MADE.
 - **REPAID**—This Indicator means that a previously reported overpayment in an active OVERPAYMENT or SATISFACTORY ARRANGEMENT MADE status has been fully repaid by the student. Schools should update the NSLDS when the final payment has been made. The date that the final payment of the overpayment was made should be entered at that time. A REPAID status will not produce the overpayment flags and messages on SARs and ISIRs.

- **Note:** When REPAID is selected and submitted, the **Ind** box on the Overpayment History page will display REPAID.
- **Repayment Date**—The date the overpayment was paid in full.
- **Source**—One of three codes identifying where the overpayment exists:
 - **EDR - ED Region**—The debt is now held by one of the U.S. Department of Education’s Debt Collection Service regional offices. This will also show the number assigned to the region currently holding the debt.
 - **TRF - Transfer**—When a school has transferred an overpayment to the Debt Collection Service (DCS), the school should update the previously reported overpayment information in the NSLDS by changing the Source from School to Transfer. This change will not invalidate the overpayment, but it will indicate that the debt is in the process of being transferred from the school to DCS.
 - **SCH - School**—Whenever a school is attempting to add a new or update an existing overpayment record, this box is automatically updated with School.
- **Region Code**—Numerical code of a Department of Education region.
 - 0—Headquarters
 - 1—Boston, MA
 - 2—New York, NY
 - 3—Philadelphia, PA
 - 4—Atlanta, GA
 - 5—Chicago, IL
 - 6—Dallas, TX
 - 7—Kansas City, MO
 - 8—Denver, CO
 - 9—San Francisco, CA
 - 10—Seattle, WA





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Logged on as: JIM NEILL from [STATE UNIVERSITY](#)


[Return To Overpayment History List](#)

 JAMES JONES

 SSN: 227-70-8995 DOB: 05/08/1969



Overpayment Add

School: [STATE UNIVERSITY 00100200](#)
 Type:
 Disbursement Date: MMDDCCYY
 Indicator:
 Repayment Date: MMDDCCYY
 Source:

Submit







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Figure 5–46, Overpayment Add









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SSN: First Name: DOB: (MMDDCCYY) Retrieve
 Logged on as: ONLINE SCHOOL ID FOR TRAINING from [HANNERS UNIVERSITY](#)

REGINA M CASTILLO
 SSN: 711-38-1871 DOB: 09/23/1982


 Overpayments


 Pell Grants

Overpayment History

Add Overpayment

	Type	Ind	Disbursement Date	Repayment Date	Create Date	Source
1	FEDERAL PELL GRANT	OVERPAYMENT	09/10/2001	N/A	03/18/2003	School
		HANNERS UNIVERSITY 00307800				Updated: 03/18/2003 by ONLINE SCHOO +


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Figure 5–47, Overpayment History after Add

5.6.2 Overpayment Add and Student Add

The Overpayment Add and Student Add page (Figure 5–48) allows you to enter student identifier and overpayment information for a student who owes an overpayment on a Title IV grant or a Perkins loan. Overpayment data reported by schools are added to the NSLDS and then transferred to the Central Processing System for inclusion on SARs and ISIRs.

How to add Student Details and Overpayment Details

To add Student Details and Overpayment Details:

- 1 In the **First Name** box, type student's first name.
- 2 In the **Middle Initial** box, type student's middle initial.
- 3 In the **Last Name** box, type student's last name.
- 4 In the **Date of Birth** box, type student's date of birth.
- 5 In the **School OPEID** box, type the school code (ED users only).
- 6 In the **Type** list, click an option. (See list of definitions below.)
- 7 In the **Disbursement Date** box, type the Disbursement Date.
- 8 In the **Indicator** list, click an option. (See list of definitions below.)
- 9 In the **Repayment Date** box, type the Repayment Date, if applicable.
- 10 In the **Source** list, click an option. (See list of definitions below.)
- 11 In the **Region Code** box, type the school's region code (ED users only).
- 12 Click **Submit**.

Notes:

- The **Social Security Number** appears in a display only field. If your original search found a PLUS borrower in the NSLDS database, the SSN that displays will be the current SSN of that PLUS Borrower. Otherwise, it will be the SSN you entered for the search. If the SSN that displays is not the current SSN of the student you wish to add to the NSLDS database, please call the Customer Service Center at **1-800-999-8219**, Monday through Friday from 8 a.m. to 8 p.m. ET.
- The **School OPEID** will automatically appear if you represent a school.

- **Org Search** allows you to search and select a **School OPEID**. Click **Org Search** and select a School OPEID by clicking the numbered bullet next to the school. Your selection will appear in the School OPEID box.

How to interpret the Overpayment Details

The text boxes in Overpayment Details are defined as follows:

- **School OPEID**—An eight-digit ED OPE code used to identify the school and school branch.
- **Type**—The Title IV student assistance funds type for which the student has received an amount in excess of what the student is eligible to receive. The following types are maintained in the NSLDS:
 - **FEDERAL PELL GRANT**—A Federal award. These grants help undergraduates pay for their education.
 - **PERKINS LOAN**—Federal Perkins Loans. These loans include the National Defense Loan (DU), the Perkins Expanded Lending (EU), the National Direct Student Loan (NU), and the Federal Perkins Loan (PU).
 - **SUPPLEMENTAL EDUCATIONAL OPPORTUNITY GRANT**—Federal Supplemental Education Opportunity Grant (SEOG). A campus-based program based on financial need for undergraduate students who have not completed their first baccalaureate degree.
- **Disbursement Date**—The date the aid was disbursed. It is important to note that the Disbursement Date the school uses must be the same date that the school used on the letters and forms assigning the obligation to Debt Collection Service.
- **Indicator**—One of three options identifying the status of the overpayment:
 - **OVERPAYMENT**—A school uses this indicator when first entering an active overpayment into the system. It means that the student owes the overpayment, and has not made satisfactory arrangements to repay. Therefore, the student should be considered ineligible for additional Title IV aid until the overpayment is repaid or otherwise resolved.

Note: When OVERPAYMENT is selected and submitted, the **Ind** box on the Overpayment History page will display OVERPAYMENT in red shading.
 - **SATISFACTORY ARRANGEMENT MADE**—This indicator means that although the student still owes the overpayment, he or she has made arrangements that are satisfactory

to the school to repay the overpayment. A status of **S** reported to other schools on a SAR or ISIR (or in the FAT process of the NSLDS) will provide documentation that the student may continue to receive Title IV aid. In the event that the student fails to meet the commitment made with the school for the arrangements to repay, the school should immediately reset the Indicator to OVERPAYMENT.

Note: When SATISFACTORY ARRANGEMENT MADE is selected and submitted, the **Ind** box on the Overpayment History page will display SATISFACTORY ARRANGEMENT MADE.


- **REPAID**—This Indicator means that a previously reported overpayment in an active OVERPAYMENT or SATISFACTORY ARRANGEMENT MADE status has been fully repaid by the student. Schools should update the NSLDS when the final payment has been made. The date that the final payment of the overpayment was made should be entered at that time. A REPAID status will not produce the overpayment flags and messages on SARs and ISIRs.

Note: When REPAID is selected and submitted, the **Ind** box on the Overpayment History page will display REPAID.

- **Repayment Date**—The date the overpayment was paid in full.
- **Source**—One of three codes identifying where the overpayment exists.
- **EDR—ED Region**—The debt is now held by one of the U.S. Department of Education’s Debt Collection Service regional offices. This will also show the number assigned to the region currently holding the debt. ED Region Codes are as follows:

- | | |
|----------------------|-----------------------|
| – 0—Headquarters | – 6—Dallas, TX |
| – 1—Boston, MA | – 7—Kansas City, MO |
| – 2—New York, NY | – 8—Denver, CO |
| – 3—Philadelphia, PA | – 9—San Francisco, CA |
| – 4—Atlanta, GA | – 10—Seattle, WA |
| – 5—Chicago, IL | |

- **TRF—Transfer**—When a school has transferred an overpayment to the Debt Collection Service (DCS), the school should update the previously reported overpayment information in NSLDS by changing the Source field from School to Transfer. This change will not invalidate the overpayment but it will indicate that the debt is in the process of being transferred from the school to DCS.
- **SCH—School**—Whenever a school is attempting to add a new or update an existing overpayment record, this box is automatically updated with School.




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Logged on as: JOSEPH HOWARD

[Return to Overpayment History](#)

No student currently selected

 **Overpayment Add**

New Student Details
Social Security Number: 566-88-2101
First Name:
Middle Initial:
Last Name:
Date Of Birth: MMDDCCYY

Overpayment Details
School OPEID: 
Type:
Disbursement Date: MMDDCCYY
Indicator:
Repayment Date: MMDDCCYY
Source:
Region Code:

Submit


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Figure 5–48, Overpayment Add and Student Add

5.7 Pell Grant History

The Pell Grant History page (Figure 5–49 and Figure 5–50) allows you to view Pell Grants that a student has been awarded. If you have any questions about a Pell Grant, call the Common Origination and Disbursement School Relations Center at **1–800–474–7268**.

How to Interpret Warning Symbols and Information Icons

The warning and informational icons at the top of the Loan History page (Figure 5–49 and Figure 5–50) reflect the status of loans and other aid for which the borrower is personally responsible. Users wishing to check the status of PLUS borrowers who have taken out loans on behalf of students should view the Loan History page for the PLUS borrower and not rely on the student's page to verify the eligibility of the PLUS borrower for further aid.

- **Bankruptcy**—The borrower has one or more loans in active bankruptcy status.
- **Defaulted**—The borrower has one or more loans in default status.
- **Overpayments**—The borrower has one or more active overpayments that have not been deferred, waived, or had satisfactory arrangements made for them.
- **Discharged**—The borrower has one or more loans with a discharge code. Discharges are identified according to the following order of precedence:
 - *Death*
 - *Reaffirm*
 - *Conditional*
 - *Permanent*
 - *Multiple*
- **Additional Unsub**—The borrower has a Direct Stafford Unsubsidized (D2) loan with Additional Health Profession or PLUS Denial indicators.
- **Close to Sub. Limit**—The borrower is close to the aggregate limit for subsidized loans.
- **Exceeds Sub. Limit**—The borrower exceeds the aggregate limit for subsidized loans.
- **Close to Comb. Limit**—The borrower is close to the aggregate limit for subsidized, unsubsidized, and/or FFEL Consolidation, Unallocated loans combined.
- **Exceeds Comb. Limit**—The borrower exceeds the aggregate limit for subsidized, unsubsidized, and/or FFEL Consolidation, Unallocated loans combined.

- **Pell Grants**—The borrower has received one or more Pell Grants for the current award year or the prior award year.

How to add and view the Transfer Student Monitoring information

Directly below the student identifiers is a message that states whether this student is on the school's Transfer Monitoring list. If the student is not on the Transfer Monitoring List for your school, there will be a message that states "Student is not on your school's Transfer Monitoring List." If the student is on the Transfer Monitoring List for your school, there will be a message that states "Student is on your school's Transfer Monitoring List."

To add student to Transfer Monitoring List:

- Click **Add Student to Monitoring List**.

To view this student's information on the Transfer Monitoring List:

- Click **Student Monitoring Detail**.

How to interpret Pell Grant History


The Pell Grant History table displays:

- **Award Year**—The school year in which the student received a Pell Grant, as reported by the awarding campus.
- **Scheduled Amount**—Scheduled amount of the Pell Grant award.
- **Award Amount**—The amount of the Pell Grant the school expects to pay the student based on the student's enrollment and school's cost of attendance.
- **Disbursed Amount**—The amount of the Pell Grant the school has disbursed to the student.
- **% Scheduled Used**—Percent of eligibility the student has used.
- **Latest Disb (Latest Disbursement)**—Latest date the Federal Pell Grant Program processed the payment record.
Note: Beginning with the 1999/2000 school year, this field is the date a disbursement is made to the student.
- **Posted by Pell**—The date when the Pell Grant is listed as disbursed on the Recipient Financial Management System (RFMS).




- **School and OPEID**—The name and OPEID of the school the student currently attends. From this field, you can link to the Organization Contact List page.
- **EFC (Expected Family Contribution)**—Index produced by the Congressional Methodology (CM) program that assesses an applicant's financial needs.
- **Ver. Flag**—Result of verification by school. The flag values are defined as follows:

Flag	Value
N	Not selected by CPS (Central Processing System)
A	Accurate
W	Without documentation
T	Tolerance
C	Calculated
R	Reprocessed
S	Selected, not verified

- **Tran**—Transaction number on the SAR or ISIR for the payment accepted by the school.



[Menu](#)
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[Report](#)
[Tran](#)








[Loan History](#) | [Overpayment History](#) | **[Pell Grant](#)** | [Student Access Interface](#)


SSN: First Name: DOB: (MMDDCCYY)


Logged on as: SAM BRUTCHER from [ALLAN HANCOCK COLLEGE](#)

STEVEN J OTTEN



SSN: 556-44-1003 DOB: 03/08/1979

 Bankruptcy
  Defaulted
  Overpayments
  Discharged
  Death
  Additional Unsub
  Sub Limit

 Pell Grants

 Student is not on your school's Transfer Monitoring List.

Pell Grant History

Award Year	Scheduled Amount	Award Amount	Disbursed Amount	% Scheduled Used	Latest Disb	Posted by Pell
2003 - 2004	\$832	\$932	\$601	63.00	10/13/2002	10/23/2002
	UNIVERSITY OF CALIFORNIA - SANT 00138100 			EFC: 2883	Ver. Flag: A	Tran: 01
2002 - 2003	\$831	\$931	\$701	73.00	10/13/2002	10/23/2002
	UNIVERSITY OF CALIFORNIA - SANT 00138100 			EFC: 1883	Ver. Flag: A	Tran: 01




[PRIVACY ACT OF 1974 \(AS AMENDED\)](#)

Figure 5–49, Pell Grant History with Add Button



[Menu](#) [Aid](#) [Enroll](#) [Org](#) [Report](#) [Tran](#)


[Loan History](#) | [Overpayment History](#) | **[Pell Grant](#)** | [Student Access Interface](#)


SSN: First Name: DOB: (MMDDCCYY) [Retrieve](#)


Logged on as: SAM BRUTCHER from [ALLAN HANCOCK COLLEGE](#)


STEVEN J OTTEN


SSN: 556-44-1003 DOB: 03/08/1979


 Bankruptcy


 Defaulted


 Overpayments


 Discharged

 Death

 Additional



 Sub Limit

 Pell Grants

 Student is on your school's Transfer Monitoring List.

[Student Monitoring Detail](#)

Pell Grant History

Award Year	Scheduled Amount	Award Amount	Disbursed Amount	% Scheduled Used	Latest Disb	Posted by Pell
2003 - 2004	\$832	\$932	\$601	63.00	10/13/2002	10/23/2002
	UNIVERSITY OF CALIFORNIA - SANT 00138100 			EFC: 2883	Ver. Flag: A	Tran: 01
2002 - 2003	\$831	\$931	\$701	73.00	10/13/2002	10/23/2002
	UNIVERSITY OF CALIFORNIA - SANT 00138100 			EFC: 1883	Ver. Flag: A	Tran: 01


 [PRIVACY ACT OF 1974 \(AS AMENDED\)](#)

Figure 5–50, Pell Grant History with Detail Button

5.8 Student Access Interface

The Student Access Interface page (Figure 5–51) links the NSLDS Financial Aid Professional (NSLDSFAP) Web site to the NSLDS Student Access Web site. This interface allows you to view the borrower's financial aid records as the borrower would view them.

To link to the NSLDS Student Access Web site:

1. Type the **SSN**, **Last Name** (first 2 characters), and **DOB**.
2. Click **Link**.
3. To return to the NSLDSFAP Web site, click **Back to FAP** at the bottom of the Financial Aid Review page.

NSLDS

Menu Aid Enroll Org Report Tran

Loan History | Overpayment History | Pell Grant | **Student Access Interface**

SSN: First Name: DOB: (MMDDCCYY) Retrieve Name Search

Logged on as: JIM NEILL from [STATE UNIVERSITY](#)

GWEN I SMITH-KLINE
SSN: 227-70-9999 DOB: 07/25/1985

Student Access Interface

SSN: 227-70-9999
Last Name: SM (First 2 characters)
DOB: 07/25/1985 (MMDDCCYY)

Link

[PRIVACY ACT OF 1974 \(AS AMENDED\)](#)

Figure 5–51, Student Access Interface

